

USSE

Segall Bryant & Hamill Select Equity ETF

Fund Description

USSE is an actively managed fund that seeks long-term capital appreciation by investing in US companies of any size. Investments are managed based on quantitative analysis, fundamental research, and ESG practices, selecting companies believed to have the potential for superior returns.

FactSet Analyst Report

USSE aims for a US-based portfolio that isn't confined by market capitalization or investment style. A mix of quantitative screens and fundamental analysis is used in the selection process. This includes financial data evaluation, statistical modeling, company holdings, and broader economic factors. The goal is to select stocks that are either known for historically producing strong investment returns or are poised to achieve exceptional ROI. In addition, ESG practices are also integrated into the investment process. Positions are opportunistically undertaken whenever there is a perceived disparity between the market price and the intrinsic value of the shares. Conversely, stocks are divested in cases of superior investment opportunities or a shift in investment thesis.