

WCEO

Hypatia Women CEO ETF

Fund Description

WCEO seeks capital appreciation through an actively managed stock portfolio of US companies that are led by a female Chief Executive Officer.

FactSet Analyst Report

WCEO provides targeted exposure to women-led US companies. The fund adviser believes that female CEOs must possess extraordinary leadership characteristics given the additional barriers women face in corporate advancement. The fund may also invest up to 20% of its assets in firms with a female Executive Chairperson or Chairperson. The portfolio may include companies of any market capitalization and investment style (value and growth). The fund expects to be primarily invested in and aims to have similar risk characteristics as the Hypatia Women CEO Index. Although, as an actively managed fund, the adviser has full discretion to make investment decisions and allocations using its proprietary methodology.

