

WGRO

WisdomTree U.S. Growth & Momentum Fund

Fund Description

WGRO tracks a factor-weighted index of US large- and mid-cap stocks selected by a combination of several growth and momentum factors.

FactSet Analyst Report

WGRO provides exposure to high growth and momentum stocks in the US, selecting securities in a way that aims to capture positive performance while trying to avoid drawdowns. The fund scores and selects stocks based on fundamental strengths and technical factors, including long-term momentum compared to short-term mean reversion, standard deviation of returns over a one-year period, change in volume compared to historical average, and other growth characteristics. The top 50-100 stocks are then chosen based on each company's scores. Holdings are approximately equally weighted based on their ranks. The ratio of the companies with the maximum weight to the ones with the lowest weight is 2:1. The index is reconstituted and rebalanced on a monthly basis.

