

WINN

Harbor Long-Term Growers ETF

Fund Description

WINN is an actively managed fund of large- and mid-cap US stocks that have above-average prospects for long-term growth. Securities are selected using a proprietary combination of bottom-up, fundamental research and systematic portfolio construction.

FactSet Analyst Report

WINN offers a growth-oriented style of investing in the US equity market. The portfolio construction starts with a bottom-up, fundamental research, which seeks to identify large- and mid-cap companies that have a combination of the following characteristics: market-leading position, disruptive business model, expected above-average revenue, earnings, and cash flow growth over the next few years, strong cash flow generation, balance sheet strength, experienced management team, and appropriate valuation relative to its growth potential. The adviser then employs a systematic portfolio construction process to manage the funds overall investment risks. Additionally, an optimization process is used to incorporate the advisers fundamental growth insights, considering diversification and liquidity risk. The fund may invest up to 20% of its net assets in foreign companies, including emerging market issuers.

