

XCOR

FundX ETF

Fund Description

XCOR is an actively managed fund-of-funds that provides broad exposure to stocks from around the world of various market capitalization that are perceived to be in sync with market leaders.

FactSet Analyst Report

XCOR is a fund-of-funds that invests in ETFs perceived to be in sync with market leaders. Using a proprietary strategy that aims to capture global market trends, the fund uses its actively managed mandate to invest in core equity funds with exposure to stocks of any size or style from around the world. The strategy allows the advisor to have full discretion to adjust the portfolio to position towards market leadership or for more attractive investments. The fund also invests, to a lesser extent, in sector and aggressive underlying funds, such as rotations between specific sectors or emerging markets, as well as less-seasoned companies. Core equity ETFs may invest in fixed income securities. Up to 50% may be invested in emerging-market ETFs. The fund may also engage in securities lending. Prior to Oct.17, 2022, XCOR was a mutual fund called FundX Upgrader Fund before converting to an ETF structure, starting with \$137.8 million in assets.