



WisdomTree Launches U.S. Growth & Momentum Fund (WGRO)

Core U.S. large-cap growth exposure seeks to capture the upside of high-growth investing while limiting drawdown and volatility

NEW YORK, Jun. 24, 2021 (GLOBE NEWSWIRE) -- WisdomTree Investments, Inc. (NASDAQ: WETF), an exchange-traded fund (“ETF”) and exchange-traded product (“ETP”) sponsor and asset manager, announced today the launch of the WisdomTree U.S. Growth & Momentum Fund (WGRO) on the NASDAQ stock exchange. WGRO seeks to track the price and yield performance, before fees and expenses, of the O’Neil Growth Index™, and has an expense ratio of 0.55%.

“An aggressive-growth investment strategy may come with significantly higher volatility,” explained Jeremy Schwartz, Global Head of Research at WisdomTree. “The WisdomTree U.S. Growth & Momentum Fund aims to solve this challenge by seeking to capture the upside of an aggressive growth portfolio, while attempting to limit the downside risk after the market tops and corrects, which is historically inherent with growth investing. We wanted to offer a strategy built for investor allocations to mid- and large-capitalization U.S. growth stocks to further build their portfolios.”

WisdomTree is utilizing a proprietary index created by O’Neil Global Advisors, Inc. in its construction of the WisdomTree U.S. Growth & Momentum Fund, which aims to improve the timing of entry points during small pullbacks and avoid holding stocks that are extended. In seeking to track the O’Neil Growth Index, WGRO is anticipated to focus on positive relative strength and, as a result, does not plan to remain invested in sectors and industries that are significantly lagging the market. Instead, WGRO anticipates investing in sectors, industries, and stocks that can be viewed as market leaders.

“The key advantage of the O’Neil Growth Index is its use of proprietary technical factors, which seeks to avoid stocks that are extended and have been deemed by the factors as being likely to correct or fall in price,” said Randy Watts, Chief Investment Officer at O’Neil Global Advisors. “We’re excited to be collaborating with WisdomTree to offer investors seeking an aggressive investment strategy and offer investors an investable portfolio that accesses our innovative O’Neil Growth Index.”

WGRO: What’s Under the Hood?

WisdomTree’s U.S. Growth & Momentum Fund utilizes O’Neil’s Growth Index in its selection process, which includes the top 50 to 100 stocks as determined by each company’s score, across the following four factors:

- **The pullback factor** seeks to increase exposure to stable growth names with positive recent price action.
- **The volatility factor** seeks to lower the long-term visibility of the portfolio and slightly increase the exposure to large cap and value stocks.
- **The Datagraph Rating™** seeks to increase exposure to companies with growth characteristics and is a proprietary O’Neil rating based on a formula that assigns weights to various factors.
- **The hotness factor** seeks to decrease exposure to companies likely to have high speculative interest by measuring the stocks’ recent change in volume compared with historical averages.

“For the last decade, momentum was synonymous with growth investing, but due to value stock performance over the last six months, many momentum strategies now have a significant value bent to their underlying portfolios, impacting investors who allocate to value on a standalone basis already.



WGRO is expected to have a consistent growth orientation in constructing its portfolio due to the O’Neil proprietary factors incorporated into its Growth Index, including the Datagraph Rating in particular,” Schwartz added.

Investors should carefully consider the investment objectives, risks, charges and expenses of the Fund before investing. To obtain a prospectus containing this and other important information, call 866.909.9473 or visit wisdomtree.com. Read the prospectus carefully before you invest.

Important Fund Information

There are risks associated with investing, including possible loss of principal. The Fund invests in mid- and large-capitalization companies that provide exposure to a portfolio of high growth and momentum U.S. exchange-listed companies. Securities that exhibit momentum characteristics may be more volatile than the market as a whole. Growth stocks, as a group, may be out of favor with the market and underperform value stocks or the overall equity market. The Fund may experience high portfolio turnover in connection with the rebalancing or adjustment of its Index. The Fund invests in the securities included in, or representative of, its Index regardless of their investment merit. The Fund does not attempt to outperform its Index or take defensive positions in declining markets and the Index may not perform as intended. The Fund is not “actively” managed and seeks to track the price and yield performance, before fees and expenses, of the Index. The Fund currently invests a significant portion of its assets in the information technology and consumer discretionary sectors. The performance could be negatively impacted by events affecting this sector. Please read the Fund’s prospectus for specific details regarding the Fund’s risk profile.

WisdomTree Funds are distributed by Foreside Fund Services LLC, in the U.S. only. Foreside Fund Services LLC is not affiliated with the other entities mentioned.

Jeremy Schwartz is a registered representative of Foreside Fund Services, LLC.

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About WisdomTree

WisdomTree Investments, Inc., through its subsidiaries in the U.S. and Europe (collectively, “WisdomTree”), is an exchange-traded fund (“ETF”) and exchange-traded product (“ETP”) sponsor and asset manager headquartered in New York. WisdomTree offers products covering equity, commodity, fixed income, leveraged and inverse, currency, cryptocurrency and alternative strategies. WisdomTree currently has approximately \$69.3 billion in assets under management globally. For more information, please visit www.wisdomtree.com or follow us on Twitter @WisdomTreeETFs.

WisdomTree® is the marketing name for WisdomTree Investments, Inc. and its subsidiaries worldwide.

About O’Neil Global Advisors

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[O’Neil Global Advisors](#), Inc. is an SEC registered investment adviser that develops systematic equity trading strategies using quantitative modeling and algorithms including the factor-based strategy that drives the O’Neil Growth Index. The company’s data scientists and engineers utilize a database containing more than 100 years of stock market information to build proprietary strategies that employ unique factors to identify stocks poised to generate alpha.



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