Still Built for Any Market: How Blending Growth and Value Creates a Stronger Core

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Key Takeaways

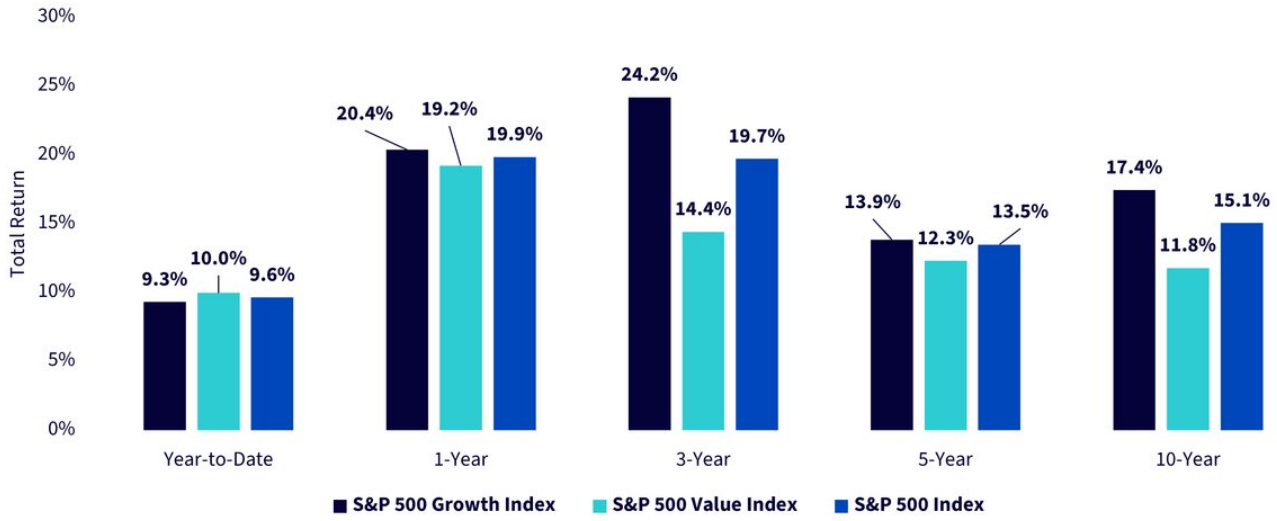
- With leadership rotating sharply between growth and value in 2026, a 50/50 allocation to the WisdomTree U.S. Quality Growth Fund (QGRW) and WisdomTree U.S. Value Fund (WTV) offers investors a more resilient core without requiring style-timing.
- Despite volatile market leadership, the QGRW/WTV blend has outperformed the S&P 500 year-to-date and over one-, three-year, and longest common history periods, demonstrating the potential benefits of balancing quality growth with value.
- The blended strategy has delivered competitive returns while trading at a meaningful valuation discount to the S&P 500, offering investors an attractive combination of earnings growth, valuation discipline and diversification.

Markets don't hand out consistent winners. Equity leadership rotates, sometimes gradually, and sometimes without warning, between growth and value. For the past decade, the story was clear: U.S. large-cap growth, led by technology, dominated. The data in Figure 1 bears that out.1

But cycles can turn quickly, particularly over shorter periods. The opening weeks of 2026 showed value stepping forward, reversing a pattern that defined much of the last cycle. Then, we saw a growth resurgence, led by such areas defined as so-called 'AI-Bottlenecks', such as the memory stocks. Then, during much of June 2026, it appeared that the U.S. growth side of the ledger came back to earth.

Looking at Figure 1, with all that volatility, it is striking how close the S&P 500 Growth, Value and standard benchmark indices are through July 17, 2026.

Figure 1: The Style Race Has Tightened Up



Sources: WisdomTree, FactSet, Morningstar, utilizing the WisdomTree Fund Compare Tool within the PATH suite of tools. Accessed on July 19, 2026, with return data as of July 17, 2026. **Past performance is not indicative of future returns. You cannot invest directly in an index.**

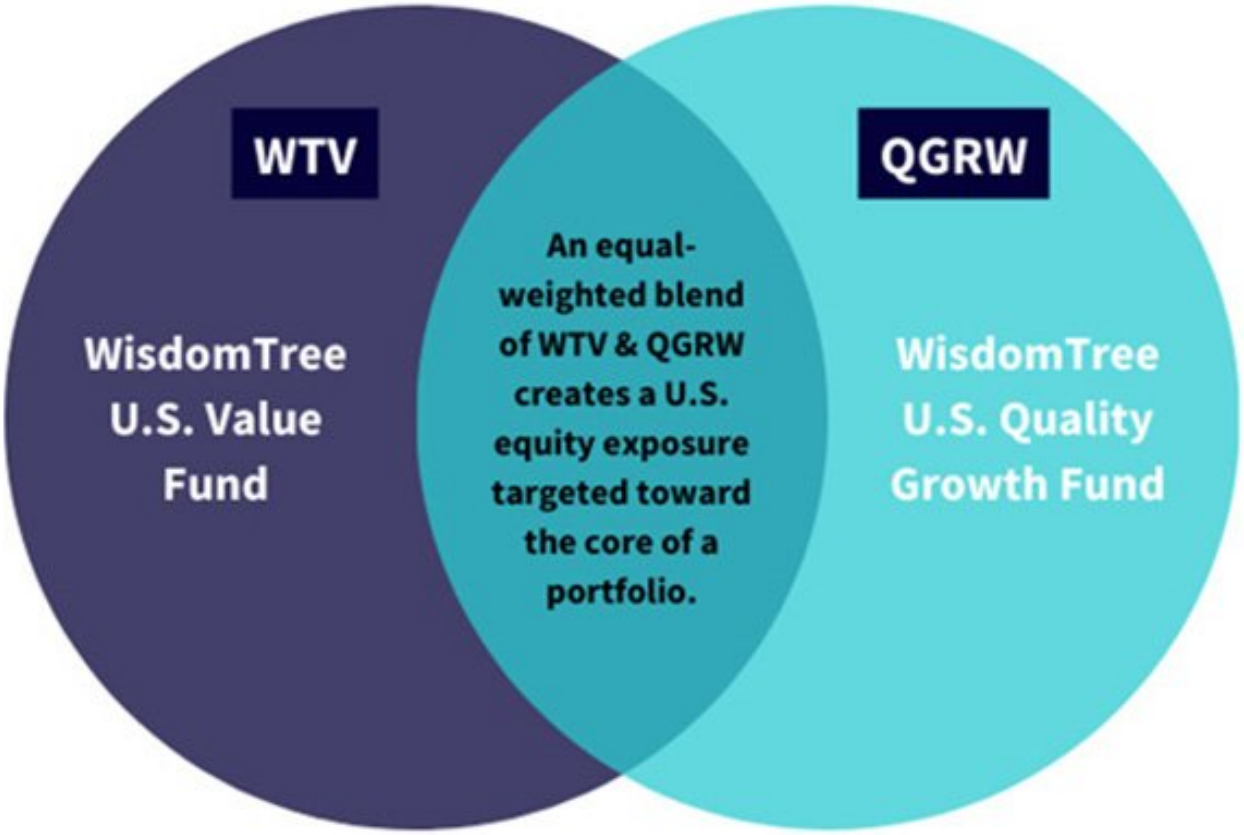
WisdomTree's Value & Quality Growth Strategies

What if you didn't have to pick a side? A well-constructed core allocation lets investors participate in both growth and value regimes, without constantly repositioning. Our 50/50 blend does exactly that, pairing two complementary WisdomTree strategies: one built around U.S. large-cap quality growth, the other around broad-based U.S. value.

- WisdomTree U.S. Quality Growth Fund (QGRW): The strategy seeks to track the total return performance of, before fees and expenses, the WisdomTree U.S. Quality Growth Index. This market capitalization-weighted strategy focuses on 100 companies that deliver particularly strong earnings growth and quality fundamental metrics. There is overlap with this strategy and the Nasdaq 100, but we believe in our more disciplined focus on selecting consistent quality growers instead of the venue the stock has a primary listing for trading.
- WisdomTree U.S. Value Fund (WTV): The strategy seeks income and capital appreciation by investing primarily in U.S. equity securities that provide a high total shareholder yield with favorable relative quality characteristics. The Fund's objective changed effective December 18, 2017. Prior to December 18, 2017, Fund performance reflects the investment objective of the Fund when it tracked the performance, before fees and expenses, of the WisdomTree U.S. LargeCap Value Index.

The combination of these two strategies leads to a strong balance of sector exposures, attractive fundamental metrics, and, while limited, a solid performance history.

Figure 2: Envisioning the 50/50 Blend



Source: WisdomTree.

Tested by Rotation, and It Has Held Up So Far

The opening weeks of 2026 were a real test. Leadership in U.S. equities rotated sharply toward value, a notable reversal after years of growth dominance. And yet the 50/50 blend held its ground. Writing this piece in late July 2026, it appears that we have since seen a growth rally, led by the memory names, and then a growth correction. As Figure 3a shows, the WisdomTree 50/50 blend maintained an edge over the S&P 500 year-to-date, even as the environment exhibited this volatility of leadership.

Figure 3a: Maintaining an Edge as Leadership Rotates

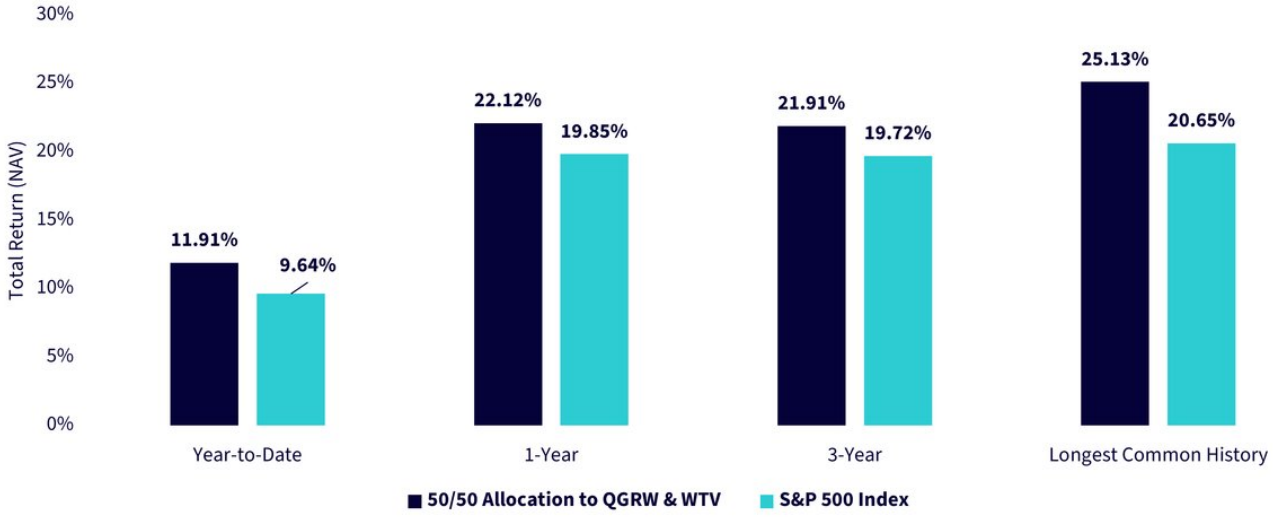


Figure 3b: Standardized Performance as of June 30, 2026

Blend/Fund/Index Name	Fund Ticker Symbol	Fund Inception Date	Fund Expense Ratio	Fund SEC 30-Day Yield	Year-to-Date	1-Year	3-Year	5-Year	10-Year	Since Fund Inception
50/50 Allocation to QGRW & WTV (NAV)					11.51%	23.34%	22.98%	N/A	N/A	N/A
WisdomTree U.S. Value Fund (NAV)	WTV	2/23/07	0.12%	2.33%	10.34%	20.78%	19.77%	13.30%	14.54%	9.43%
WisdomTree U.S. Value Fund (MP)	WTV	2/23/07	0.12%	2.33%	10.32%	20.79%	19.78%	13.30%	14.55%	9.44%
WisdomTree U.S. Quality Growth Fund (NAV)	QGRW	12/15/22	0.28%	0.14%	12.63%	25.84%	26.14%	N/A	N/A	31.52%
WisdomTree U.S. Quality Growth Fund (MP)	QGRW	12/15/22	0.28%	0.14%	12.57%	25.79%	26.12%	N/A	N/A	31.50%
S&P 500 Index					10.21%	22.32%	20.61%	13.41%	15.51%	N/A

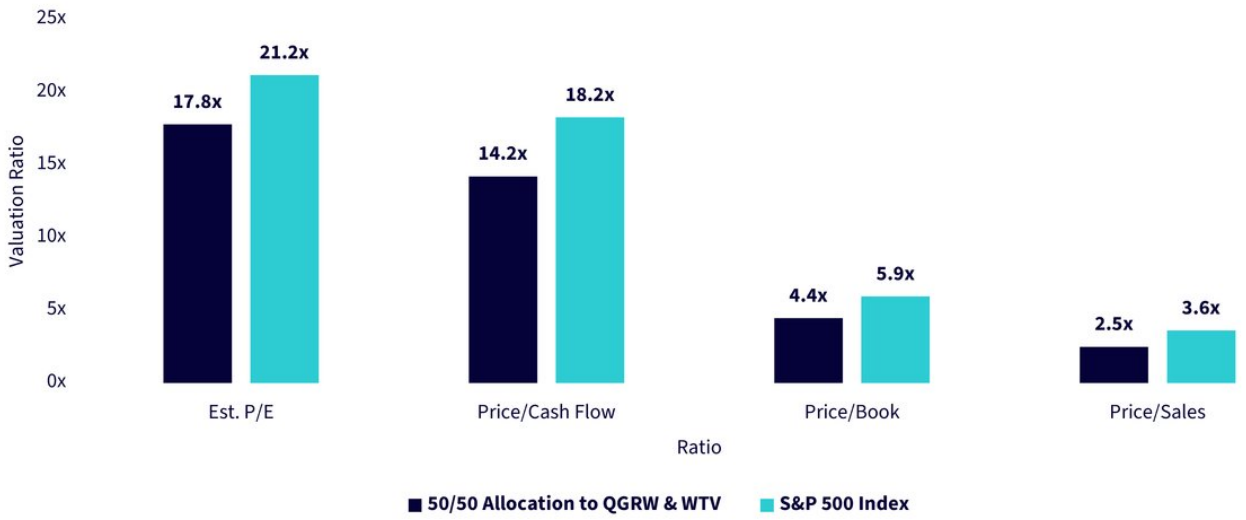
Sources: WisdomTree, Morningstar, FactSet specifically data from the Fund Comparison Tool in the PATH suite of tools, accessed July 19, 2026 with returns for Figure 3a as of July 17, 2026 and for Figure 3b as of June 30, 2026. NAV denotes total return performance at net asset value. MP denotes market price performance. In the case of WTV, the Fund's objective changed effective December 18, 2017. Prior to December 18, 2017, Fund performance reflects the investment objective of the Fund when it tracked the performance, before fees and expenses, of the WisdomTree U.S. LargeCap Value Index. **Past performance is not indicative of future results. Investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted. For the most recent month-end and standardized performance and to download the respective Fund prospectuses, click the relevant ticker: QGRW, WTV.**

Strong Returns Without Paying Up for Them

Here's what makes Figure 4 worth a close look: the 50/50 blend has delivered competitive returns while trading at a meaningful discount to the S&P 500 across notable valuation metrics, including estimated P/E, price-to-cash flow, price-to-book and price-to-sales. That's not a small distinction. It suggests performance hasn't been driven by multiple expansion alone, but by a genuine balance of earnings growth and

valuation discipline. In an environment where leadership is shifting and valuations are under scrutiny, that combination matters.

Figure 4: Better Value, Competitive Returns: The Blend's Valuation Advantage



Sources: FactSet, Morningstar, WisdomTree, with data from WisdomTree's Fund Compare Tool from WisdomTree's PATH suite of tools. Figures as of June 30, 2026. **Subject to change.**

Conclusion: Ready for Whatever Comes Next

Markets in 2026 are forcing hard questions about concentration, valuation, and what "core" really means. The 50/50 allocation to QGRW and WTV is our answer: structural balance that doesn't require predicting which style wins next. The year has already shown value surge ahead, then growth reassert itself, and we will keep watching as it unfolds. Either way, the blend has a component ready to respond. That's what a true core holding should do.

1 "Growth" refers to the S&P 500 Growth Index, "Value" refers to the S&P 500 Value Index.

Important Risks Related to this Article

There are risks associated with investing, including possible loss of principal. Please read the Fund's prospectus for specific details regarding the Fund's risk profile.

WTV: Value stocks, as a group, may be out of favor with the market and underperform growth stocks or the overall equity market. Funds focusing their investments on certain sectors increase their vulnerability to any single economic or regulatory development. This may result in greater share price volatility. While the Fund is actively managed, the Fund's investment process is heavily dependent on quantitative models and the models may not perform as intended.

QGRW: Growth stocks, as a group, may be out of favor with the market and underperform value stocks or the overall equity market. Growth stocks are generally more sensitive to market movements than other types of stocks. The Fund is non-diversified, as a result, changes in the market value of a single security could cause greater fluctuations in the value of Fund shares than would occur in a diversified fund. The Fund invests in the securities included in, or representative of, its Index regardless of their investment merit and the Fund does not attempt to outperform its Index. The composition of the Index is governed by an Index Committee and the Index may not perform as intended.