

ETFs & Index Funds

BEGINNER

PRACTICE WORKSHEET

Grab a pen and pick one real ETF you're curious about. Research it using the 4-point checklist from the lesson, and write down what you find — there's no wrong answer, the goal is just practice.

■ Section 1 — Pick a Fund

Which ETF are you researching, and what index or theme does it track?

Roughly how many companies does it hold?

■ Section 2 — The 4-Point Checklist

What's its expense ratio?

What are its 3 largest individual holdings, and roughly what % of the fund is each one?

Is it a broad, diversified fund, or a narrower sector/thematic fund? How do you know?

Tip: try the interactive “Diversification Impact Calculator” on the ETFs lesson page at growthcapitalgroup.co to test what a single holding's move would do to your own numbers.

■ Section 3 — Reflection

Based on your research, is this fund as diversified as you expected going in? Why or why not?