

S&P Capital IQ Expands its ETF Research Offerings to Include Fixed Income, Commodity and Currency-Focused Funds

Rankings and reports will be available on approximately 180 fixed income ETFs; reports will be offered on 60+ commodity and currency ETFs

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NEW YORK, May 20, 2013 /PRNewswire/ -- [S&P Capital IQ](#), creators of an independent holdings-based approach to fund research and rankings, has added research coverage on hundreds of additional Exchange-Traded Funds (ETFs) to its MarketScope® Advisor platform, it was announced today.

Starting May 20, reports and rankings are being made available on approximately 180 fixed income ETFs, with reports also offered on more than 60 ETFs focused on commodities and currencies.

"The ETF growth story is one that crosses asset classes, and as fixed income, commodity and currency-focused ETFs continue to attract significant investor attention, we're pleased to be adding well over 200 such ETFs to our coverage list," said Todd Rosenbluth, Director of ETF and Mutual Fund Research at S&P Capital IQ and one of the architects of the firm's approach to fund research and rankings.

Approximately half of the fixed income ETF reports being added to S&P Capital IQ's research offering have a live history of less than three years, with approximately 50% of those having more than \$100 million in assets under management (AUM).

S&P Capital IQ will be using a holdings-based approach for the fixed income ETFs, similar to that created by the company for equity ETFs, which will result in rankings of Overweight, Marketweight, or Underweight. Factors that are considered in this approach include credit quality, interest-rate sensitivity, expense ratio and trading characteristics. The research reports will also include credit default swap data and commentary and insights from S&P Capital IQ's experienced fixed income and ETF analytical teams.

"Fixed income is a component in virtually every asset allocation model. With now over \$250 billion in assets, fixed income ETFs have become a very popular, and very useful, tool for investors and advisors looking to add yield and diversification while often paying less in fees than they otherwise would for similar mutual funds," added Rosenbluth. "That being said, the universe of ETFs has exploded in recent years, making due diligence essential before selecting a fund in order to ensure that it offers the risk-reward characteristics that an advisor or investor may be seeking without incurring elevated costs."

S&P Capital IQ is also introducing reports on approximately 40 commodity ETFs, including funds that focus on physical commodities and those that hold derivatives. Additionally, S&P Capital IQ will be adding reports on more than 20 currency-focused ETFs. Neither commodity nor currency ETFs will receive rankings at this time, but reports will offer asset class analysis.

"As ETFs make up an increasingly large share of investors' portfolios, the need for high-quality, holdings-based research continues to gain importance," said Anthony Hohmann, ETF Product Manager at S&P Capital IQ. "We're looking forward to sharing expanded analysis on fixed income, commodity and currency ETFs with our clients while we continue to build on our innovative approach to equity ETF research."

ETF reports are originally published on S&P Capital IQ's [MarketScope Advisor](#) platform. S&P Capital IQ will be hosting an ETF Analyst Hour on May 21 at 11am, with guest Dodd Kittsley, Global Head of ETF Research at BlackRock, to review the methodology and key trends. Visit [Click here to register](#).

About S&P Capital IQ

S&P Capital IQ, a part of McGraw Hill Financial, is a leading provider of multi-asset class and real time data, research and analytics to institutional investors, investment and commercial banks, investment advisors and wealth managers, corporations and universities around the world. Evaluated pricing is prepared by Standard & Poor's Securities Evaluations, Inc., a part of S&P Capital IQ and a registered investment adviser with the U.S. Securities and Exchange Commission. In the United States, research reports are prepared by Standard & Poor's Investment Advisory Services LLC, a part of S&P Capital IQ and a registered investment adviser with the U.S. Securities and Exchange Commission. S&P Capital IQ provides a broad suite of capabilities designed to help track performance, generate alpha, and identify new trading and investment ideas, and perform risk analysis and mitigation strategies. Through leading desktop solutions such as the S&P Capital IQ, Global Credit Portal and MarketScope Advisor desktops; enterprise solutions such as S&P Capital IQ Valuations; and research offerings, including Leveraged Commentary & Data, Global Markets Intelligence, and company and funds research, S&P Capital IQ sharpens financial intelligence into the wisdom today's investors need. For more information visit: www.spcapitaliq.com.

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