

## MarketVector Indexes Licenses REIT Index to Tidal to Capture REIT Opportunity

**FRANKFURT, Germany (March 6, 2024)** – MarketVector Indexes™ (“MarketVector”) announces the licensing of the [iREIT®-MarketVector™ Quality REIT Index \(ticker: IRET\)](#) to Tidal Investments, LLC (“Tidal”), highlighting MarketVector’s ability to provide customizable indexes in varying sectors for clients across the globe.

In partnership with Tidal, leading real estate analyst Brad Thomas, CEO of Wide Moat Research, launched the [IRET ETF \(ticker: IRET\)](#) built on an index Brad designed with MarketVector. This unique product invests in REITs across all property sectors, utilizing fundamental analysis to provide investors with exposure to diversification, potentially higher yields, and a focus on quality and value investing.

“As a prolific income-focused writer on Seeking Alpha with over 115,000 followers I’m honored to provide my readership base with a REIT ETF focused on reliable and predictable income. Our index is designed to provide diversified property sector and geographical exposure while targeting constituents with the best quality and value attributes. As the chief architect for the index, my number one goal is to ensure steady and growing income so investors can be more confident about their real estate investments,” said Brad Thomas, CEO Wide Moat Research.

“Gearing up to support the launch of the IRET ETF in partnership with MarketVector and Brad Thomas is truly exciting for us at Tidal Financial Group. We’re thrilled to offer investors an opportunity to access quality REITs through this innovative product,” said Gavin Filmore, CRO of Tidal.

REITS have historically held up during high inflationary environments and the index focuses on quality businesses and yield enhancement for all-weather exposure leveraging a systematic six-pillar approach. The index provides exposure to a range of real estate companies including self-storage, which investors look to as an inflation hedge, as well as hotel stocks.

“The real estate sector has been hit by multiple shocks over the last few years from e-commerce’s threat to the retail sector to the work-from-home trend’s threat to the office sector,” said Josh Kaplan, Head of Research at MarketVector. “Nonetheless, real estate remains an important component of well-diversified portfolios seeking both capital appreciation and income. The methodology driving this index will fill a gap in the US-listed real estate ETF market by seeking to provide investors with a diversified portfolio of leading REITs that have been rigorously screened for quality and valuation factors.”

For more details on the [iREIT®-MarketVector™ Quality REIT Index \(ticker: IRET\)](#) and other offerings, please visit [MarketVector website](#).

### **Key Index Features**

[iREIT®-MarketVector™ Quality REIT Index \(IRET\)](#)

Number of Components: 35

Base Date: December 31, 2017

Base Value: 1,000

**End**

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### **About MarketVector Indexes - [www.marketvector.com](http://www.marketvector.com)**

MarketVector Indexes™ (“MarketVector”) is a regulated Benchmark Administrator in Europe, incorporated in Germany and registered with the Federal Financial Supervisory Authority (BaFin). MarketVector maintains indexes under the MarketVector™, MVIS® , and BlueStar® names. With a mission to accelerate index innovation globally, MarketVector is best known for its broad suite of Thematic indexes, long-running expertise in Hard Asset-linked Equity indexes, and its pioneering Digital Asset index family. MarketVector is proud to partner with more than 25 Exchange-Traded Product (ETP) issuers and index fund managers in markets worldwide, with more than USD 38 billion in assets under management.

### **About Tidal Investments, LLC - [www.tidalfinancialgroup.com](http://www.tidalfinancialgroup.com)**

Formed by ETF industry pioneers and thought leaders, Tidal Investments LLC sets out to revolutionize the way ETFs have historically been developed, launched, marketed, and sold. With a focus on growing AUM, Tidal offers a comprehensive suite of services, proprietary tools, and methodologies designed to bring lasting ideas to market. Tidal is an advocate for ETF innovation.

The firm is on a mission to provide issuers with the intelligence and tools needed to efficiently and to effectively launch ETFs and to optimize growth potential in a highly competitive space.

**About Wide Moat - [www.widemoatresearch.com](http://www.widemoatresearch.com)**

Wide Moat Research is an independent investment research firm that focuses on a broad range of income-focused opportunities. Wide Moat's coverage spectrum includes over 500 companies that include REITs, BDCs, MLPs, asset managers, homebuilders, utilities, and other divided-paying stocks. Wide Moat Research has over 100,000 subscribers worldwide and Brad Thomas, the founder, has over 30 years of investing experience with over 115,000 followers on Seeking Alpha.

**"Before investing you should carefully consider the Fund's investment objectives, risks, charges and expenses. This and other information is in the prospectus. Please read the prospectuses carefully before you invest."**

Investments involve risk. Principal loss is possible.

**REIT Risk.** A REIT is a company that owns or finances income-producing real estate and meets certain requirements under the Internal Revenue Code of 1986, as amended (the "Code"), as more fully described in the Fund's Statement of Additional Information ("SAI"). Through its investments in REITs, the Fund is subject to the risks of investing in the real estate market, including decreases in property revenues, increases in interest rates, increases in property taxes and operating expenses, legal and regulatory changes, a lack of credit or capital, defaults by borrowers or tenants, environmental problems and natural disasters.

**Concentration Risk.** The Fund's investments will be concentrated in the real estate industry. As a result, the value of Shares may rise and fall more than the value of shares that invest in securities of companies in a broader range of industries.

**Preferred Stock Risk.** Investing in preferred stocks of REITs is subject to general market and issuer-specific risks, as well as interest rate risk due to their fixed or variable return rates.

**Models and Data Risk.** The composition of the Index is heavily dependent on proprietary quantitative models as well as information and data supplied by third parties ("Models and Data").

**New Fund Risk.** The Fund is a recently organized management investment company with no operating history. As a result, prospective investors do not have a track record or history on which to base their investment decisions.

**Tracking Error Risk.** As with all index funds, the performance of the Fund and its Index may differ from each other for a variety of reasons.

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