

# MarketGrader US Mid Cap Select 50 Index



The MarketGrader U.S. Mid Cap Select 50 Index identifies 50 mid-sized companies with the most attractive combination of sustainable growth and strong financial quality, as defined by MarketGrader's multi-factor rating system. Each company is evaluated across growth, value, profitability, and cash flow metrics—producing a fundamentals-first alternative to conventional size-based benchmarks.

## Index Rules

### Underlying Universe

The constituents of its parent index, the MarketGrader US Mid Cap Core Index.

### Objective

Designed to harness the returns from the mid cap segment of the U.S. equity market, while adding alpha over time by selecting the segment's highest quality companies based on MarketGrader's methodology.

### Weighting

Index constituent weights are based on each company's free float market capitalization.

### Rebalance Frequency

Semi-annually on the third Friday of March and September.

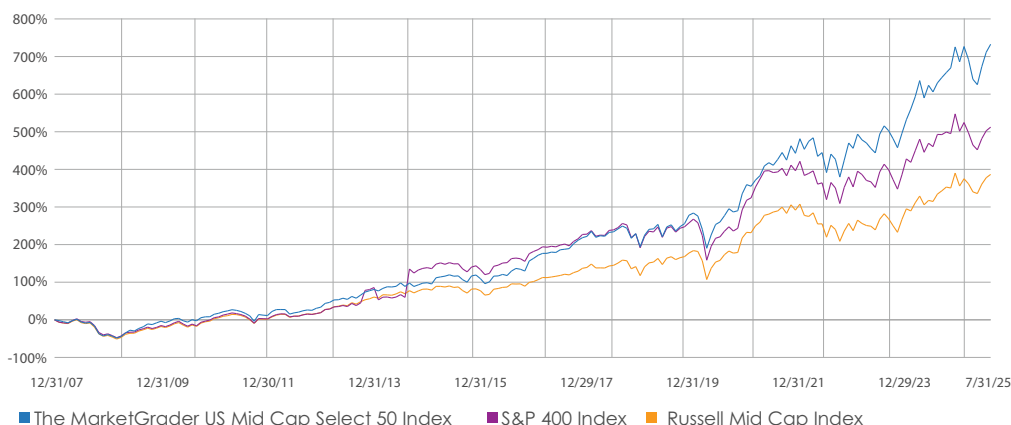
### Selection Criteria

On the Index's rebalance selection date, the 50 largest companies by total market capitalization from the parent Index (the MarketGrader US Mid Cap Core Index) are selected, which then become the Index's constituents for the following six-month period.

## Performance

### Cumulative Total Return Dec. 2007 - Jul. 2025

All data as of July 31, 2025



### Calendar Year Returns (%)

	MGUSMC50 TR	SPX TR	RMCC TR
2025*	6.0	1.8	6.8
2024	24.4	13.9	15.3
2023	13.7	16.4	17.2
2022	-4.4	-13.1	-17.3
2021	26.6	24.8	22.6
2020	19.7	13.7	17.1
2019	30.4	26.2	30.5
2018	-8.5	-11.1	-9.1
2017	22.1	0.0	18.5
2016	25.9	0.0	13.8
2015	5.4	0.0	-2.4
2014	9.8	0.0	13.2
2013	35.4	56.2	34.8
2012	19.9	16.1	17.3
2011	-3.0	-3.1	-1.6
2010	19.3	24.9	25.5
2009	58.7	35.0	40.5
2008	-39.3	-37.3	-41.5

\*YTD values through July 31, 2025  
SPX = S&P 400 Index RMCC = Russell Midcap Index

### Annualized Returns (%)

	MGUSMC50 TR	SPX TR	RMCC TR
3-Years	15.5	9.6	11.5
5 -Years	17.2	12.8	12.2
Since 12/31/07	12.8	10.9	9.4

### Cumulative Returns (%)

	MGUSMC50 TR	SPX TR	RMCC TR
3-Years	54	31	38
5 -Years	121	82	78
Since 12/31/07	732	512	386

### Standard Deviation (%)

	MGUSMC50 TR	SPX TR	RMCC TR
3-Years	17.7	19.5	18.2
5 -Years	17.4	18.8	18.0
Since 12/31/07	19.1	22.9	18.4

### Return / Standard Deviation

	MGUSMC50 TR	SPX TR	RMCC TR
3-Years	0.88	0.49	0.63
5 -Years	0.99	0.68	0.68
Since 12/31/07	0.67	0.47	0.51

Frequency: Monthly

### Licensing opportunities

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The MarketGrader U.S. Core Select 50 Indexes were first published on August 2, 2023. All estimated daily historical closing prices prior to that date are based on back-testing (i.e., calculations of how the index might have performed in the past if it had existed). Backtested performance information is purely hypothetical and is solely for informational purposes. Backtested performance does not represent actual performance, and should not be interpreted as an indication of actual performance. Past performance is not indicative of future results. One cannot invest in an index.

# MarketGrader US Mid Cap Select 50 Index

Index composition data as of July 31, 2025

## Index Bio

Average Market Cap (millions of USD)	\$16,466
Median Market Cap (millions of USD)	\$14,947
Average 3 Mo. Volume (Dollars)	\$221,409,778
Average 3 Mo. Volume (Shares)	3,205,886
Most Recent Rebalance	3/24/25
Companies Replaced	36
Sector with Biggest Increase	Financials
Sector with Biggest Decrease	Consumer Discretionary
Companies Overlapping S&P 500	25

## Fundamental Attributes

Median

Trailing P/E Ratio	21.8
Forward P/E Ratio	13.1
Earnings Yield	4.4%
Price/Tangible Book Ratio	2.7
Revenue Change - 3 Years	16.7%
Operating Income Change - 3 Years	57.3%
Operating Margin	17.9%
Earnings per Share (EPS) 3-Year Growth	2.5%
Total Debt to Capital	38.9%
Return on Equity	15.9%
Dividend Yield	0.73%
Beta	1.06

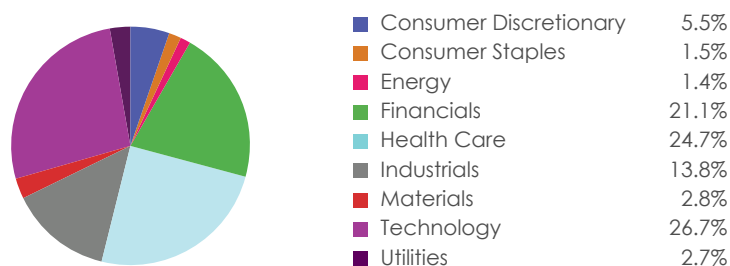
## Median and Average Grades

Median

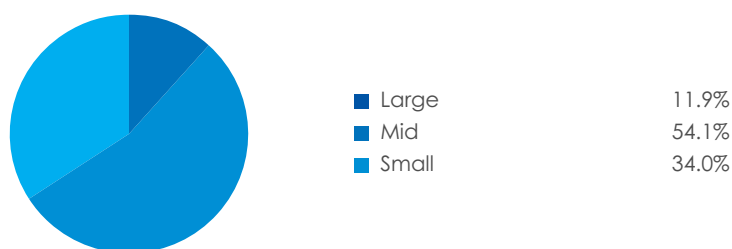
Average

MarketGrader US Mid Cap Select 50 Index	55.0	54.9
S&P 400 Index	45.8	47.0
Russell Mid Cap Index	50.2	51.3

## Sector Breakdown (based on aggregate weight)



## Market Cap Breakdown (based on aggregate weight)



## Top 20 Stocks by Fundamentals

Ticker	Name	Grade
FIX	Comfort Systems USA, Inc.	76.8
BMRN	BioMarin Pharmaceutical Inc.	70.2
UTHR	United Therapeutics Corporation	69.4
LAMR	Lamar Advertising Company Class	69.1
FFIV	F5, Inc.	69.0
RF	Regions Financial Corporation	67.9
UHS	Universal Health Services, Inc.	67.5
NRG	NRG Energy, Inc.	67.2
SN	SharkNinja, Inc.	65.1
LDOS	Leidos Holdings, Inc.	64.8
CRS	Carpenter Technology Corpora-	62.5
TPR	Tapestry, Inc.	61.5
ZBRA	Zebra Technologies Corporation	61.4
NTAP	NetApp, Inc.	61.2
WDC	Western Digital Corporation	60.9
STE	STERIS plc	60.5
PCTY	Paylocity Holding Corp.	60.3
FHN	First Horizon Corporation	60.2
BIIB	Biogen Inc.	59.5
ZM	Zoom Communications, Inc. Class	59.3

## Stocks with the Most Selections Since Inception

Ticker	Name	Times
UTHR	United Therapeutics Corporation	12
UHS	Universal Health Services, Inc. Class	10
FFIV	F5, Inc.	10
FNF	Fidelity National Financial, Inc. - FNF	10
LDOS	Leidos Holdings, Inc.	8
ICLR	ICON Plc	8
PCTY	Paylocity Holding Corp.	5
FHN	First Horizon Corporation	5
EMN	Eastman Chemical Company	4
GL	Globe Life Inc.	4