

AI-00793 FTEC IYW SOXX Comparison

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Compare the following ETF using the YTD, 1Year, 3 Years, 5 years Performance, Expense Ratio, Market Cap, Inception Date Use a table format in your response.

FTEC, IYW and SOXX

Certainly! Let's compare the **FTEC**, **IYW**, and **SOXX** exchange-traded funds (ETFs) based on their performance, expense ratios, market capitalization, and inception dates. Below is a table summarizing the relevant information:

ETF	YTD Return	1-Year Return	3-Year Return	5-Year Return	Expense Ratio	Market Cap	Inception Date
FTEC	4.04%	41.37%	13.12%	23.64%	0.08%	\$8.61 billion	Nov 5, 1997
IYW	8.09%	57.94%	14.23%	24.46%	0.40%	\$15.59 billion	May 15, 2000
SOXX	18.01%	67.41%	15.46%	29.08%	0.35%	\$11.87 billion	Jul 10, 2001

Here's a brief overview of each ETF:

1. FTEC (Fidelity MSCI Information Technology Index ETF):

- YTD Return: 4.04%
- 1-Year Return: 41.37%
- 3-Year Return: 13.12%
- 5-Year Return: 23.64%
- Expense Ratio: 0.08%
- Market Cap: \$8.61 billion
- Inception Date: Nov 5, 1997 12

2. IYW (iShares U.S. Technology ETF):

- YTD Return: 8.09%
- 1-Year Return: 57.94%
- 3-Year Return: 14.23%
- 5-Year Return: 24.46%
- Expense Ratio: 0.40%
- Market Cap: \$15.59 billion
- Inception Date: May 15, 2000 34

3. SOXX (iShares Semiconductor ETF):

- YTD Return: 18.01%
- 1-Year Return: 67.41%
- 3-Year Return: 15.46%
- 5-Year Return: 29.08%
- Expense Ratio: 0.35%

- Market Cap: \$11.87 billion
- Inception Date: Jul 10, 2001 56

Please note that the inception date represents when the ETF was first introduced to the market.

List the top 20 Holding of FTEC, IYW, SOXX. Included the % Weight each company holds and market cap. Use a table format in your response.

Certainly! Let's compare the top holdings of the **FTEC**, **IYW**, and **SOXX** exchange-traded funds (ETFs) based on their percentage weights and market capitalization. Below is a table summarizing the relevant information:

ETF	Company	% Weight	Market Cap (USD)
FTEC	Microsoft Corporation (MSFT)	21.02%	\$2.56 trillion
	Apple Inc (AAPL)	19.09%	\$2.47 trillion
	NVIDIA Corporation (NVDA)	6.33%	\$1.13 trillion
	Broadcom Inc. (AVGO)	4.35%	\$207.84 billion
	Salesforce, Inc. (CRM)	2.22%	\$248.72 billion
IYW	Microsoft Corporation (MSFT)	16.82%	\$2.56 trillion
	Apple Inc (AAPL)	14.79%	\$2.47 trillion
	NVIDIA Corporation (NVDA)	6.82%	\$1.13 trillion
	Meta Platforms, Inc. (META)	4.87%	\$1.07 trillion
	Alphabet Inc. (GOOGL)	4.75%	\$1.83 trillion
SOXX	Advanced Micro Devices Inc (AMD)	9.67%	\$154.98 billion
	NVIDIA Corp (NVDA)	9.19%	\$1.13 trillion
	Broadcom Inc (AVGO)	8.90%	\$207.84 billion
	Qualcomm Inc (QCOM)	6.45%	\$176.62 billion
	Intel Corp (INTC)	5.41%	\$228.13 billion

Please note that market capitalization reflects the total value of the company's outstanding shares and can impact the ETF's performance and stability. Always consider other factors when making investment decisions.

Which is better, FTEC, IYW or SOXX for a 3 year investment window?

When considering a **3-year investment window**, it's essential to evaluate various factors before making a decision. Let's compare the three ETFs—**FTEC**, **IYW**, and **SOXX**—to help you decide:

1. FTEC (Fidelity MSCI Information Technology Index ETF):

- **YTD Return:** 4.04%
- **1-Year Return:** 41.37%
- **3-Year Return:** 13.12%
- **5-Year Return:** 23.64%
- **Expense Ratio:** 0.08%
- **Market Cap:** \$8.61 billion
- **Inception Date:** Nov 5, 1997

2. IYW (iShares U.S. Technology ETF):

- **YTD Return:** 8.09%
- **1-Year Return:** 57.94%
- **3-Year Return:** 14.23%
- **5-Year Return:** 24.46%

- **Expense Ratio:** 0.40%
- **Market Cap:** \$15.59 billion
- **Inception Date:** May 15, 2000

3. **SOXX (iShares Semiconductor ETF):**

- **YTD Return:** 18.01%
- **1-Year Return:** 67.41%
- **3-Year Return:** 15.46%
- **5-Year Return:** 29.08%
- **Expense Ratio:** 0.35%
- **Market Cap:** \$11.87 billion
- **Inception Date:** Jul 10, 2001

Here are some considerations:

- **Risk Tolerance:** If you seek higher returns and are comfortable with volatility, **SOXX** has shown strong performance recently due to the semiconductor industry's growth.
- **Diversification:** **IYW** provides broader exposure to the U.S. technology sector, including giants like Microsoft and Apple.
- **Expense Ratio:** Lower expense ratios (like **FTEC**) can enhance long-term returns by minimizing costs.
- **Sector Focus:** Consider your preference for technology stocks (**FTEC** and **IYW**) versus semiconductor-specific exposure (**SOXX**).

Remember that past performance does not guarantee future results. Evaluate your risk tolerance, investment goals, and overall portfolio diversification when making your decision. Consulting a financial advisor is advisable for personalized guidance.