

WHITE PAPER

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Mutual Fund to ETF Conversion: Operational Considerations

Beginning in 2021, there has been a steadily increasing trend of mutual funds converting to ETFs. Some key differentiators between mutual funds and ETFs are how investors purchase and sell shares, and how the funds themselves purchase and sell portfolio holdings. ETFs are attractive to certain investors, when compared to mutual funds, because they offer intra-day liquidity and provide increased transparency on holdings information, often with lower fees. Certain ETFs can also provide greater tax efficiency to investors in taxable accounts. When compared to mutual funds, these potential benefits have led to increasing interest in the use of ETFs as an investment vehicle.

[Read more in the white paper.](#)

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