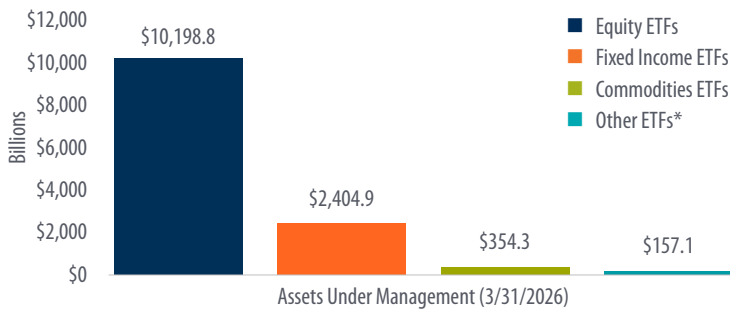


ETF DATA WATCH: ASSET FLOWS MONITOR

APRIL 2026

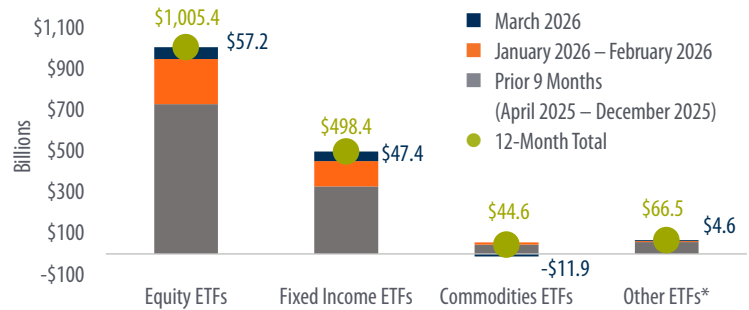
Ryan O. Issakainen, CFA | Senior Vice President | ETF Strategist

Total Assets Under Management: US-Listed ETFs

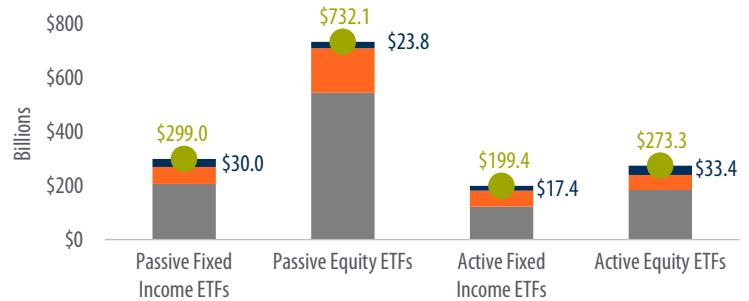


- Net inflows for US-listed ETFs totaled \$97.3 billion in March, bringing total ETF assets under management to \$13.1 trillion.
- Equity ETFs had net inflows totaling \$57.2 billion in March, bringing trailing 12-months (TTM) net inflows to \$1.01 trillion. Active equity ETFs accounted for \$33.4 billion in net inflows in March, compared to \$23.8 billion in net inflows for passive equity ETFs. Total AUM in actively managed equity ETFs was \$929.3 billion, accounting for 9.1% of all equity ETF assets (\$10.2 trillion), as of 3/31/26.
- Fixed income ETFs had net inflows totaling \$47.4 billion in March, bringing TTM net inflows to \$498.4 billion. Active fixed income ETFs accounted for \$17.4 billion in net inflows in March, compared to \$30.0 billion in net inflows for passive fixed income ETFs. Total AUM in actively managed fixed income ETFs were \$547.8 billion, accounting for 22.8% of all fixed income ETF assets (\$2.4 trillion), as of 3/31/26.
- Commodities ETFs had net outflows totaling \$11.9 billion in March, bringing TTM net inflows to \$44.6 billion. Precious metals ETFs (-\$15.8 billion) had the largest net outflows for the month, partially offset by energy ETF inflows (\$1.5 billion).

ETF Net Asset Flows by Asset Class



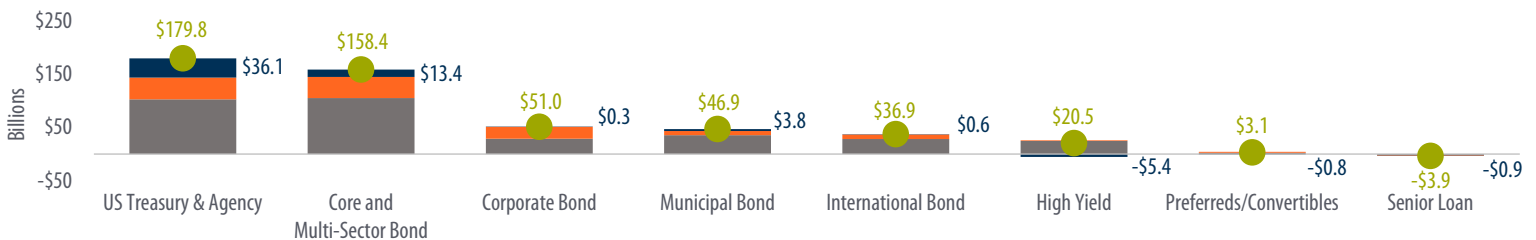
Active vs. Passive Net Flows



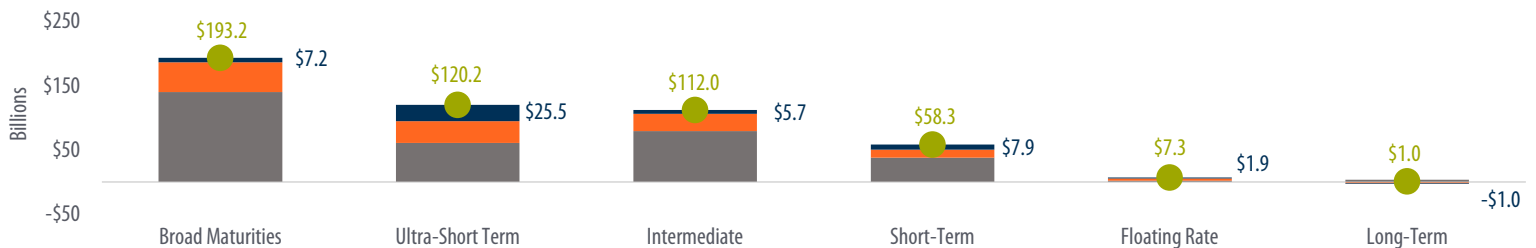
FIXED INCOME ETFs

■ March 2026 ■ January 2026 - February 2026 ■ Prior 9 Months (April 2025 - December 2025) ● 12-Month Total

ETF Net Asset Flows by Fixed Income Category



ETF Net Asset Flows by Fixed Income Maturity Target



- Core and US Treasury & Agency (+\$36.1 billion), Core & Multi-Sector Bonds (+\$13.4 billion), Municipal Bond (+\$3.8 billion), International Bond (+\$0.6 billion), and Corporate Bond (+\$0.3 billion) ETFs had the strongest net inflows in March. High Yield Bond (-\$5.4 billion), Senior Loan (-\$0.9 billion), and Preferred/Convertibles (-\$0.8 billion) ETFs had the largest outflows.
- Fixed income ETFs with ultra short-term maturities (+\$25.5 billion), short-term maturities (+\$7.9 billion), broad maturities (+\$7.2 billion), intermediate maturities (+\$5.7 billion), and floating rate securities (+\$1.9 billion) had the largest net inflows in March.

Data Source: FactSet.

*"Other ETFs" includes asset allocation, alternatives, and currency ETFs.

ETF DATA WATCH: ASSET FLOWS MONITOR

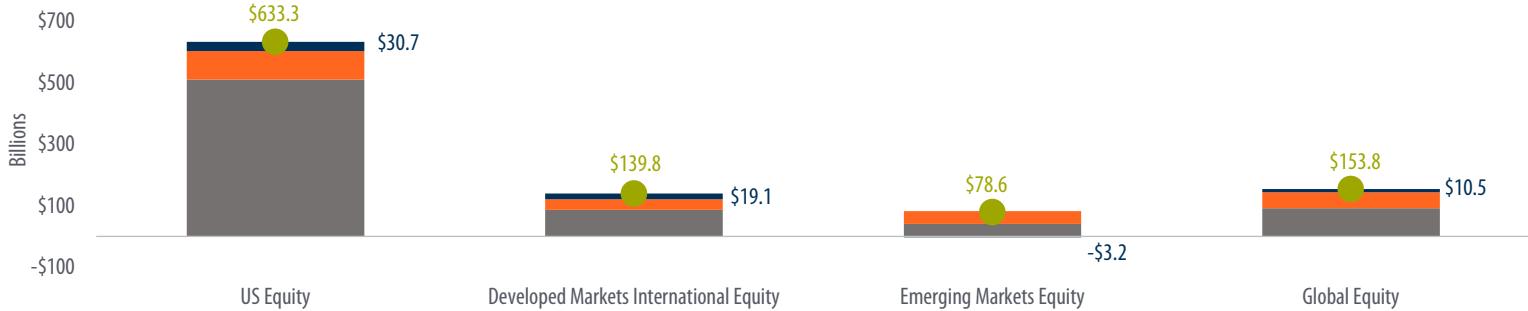
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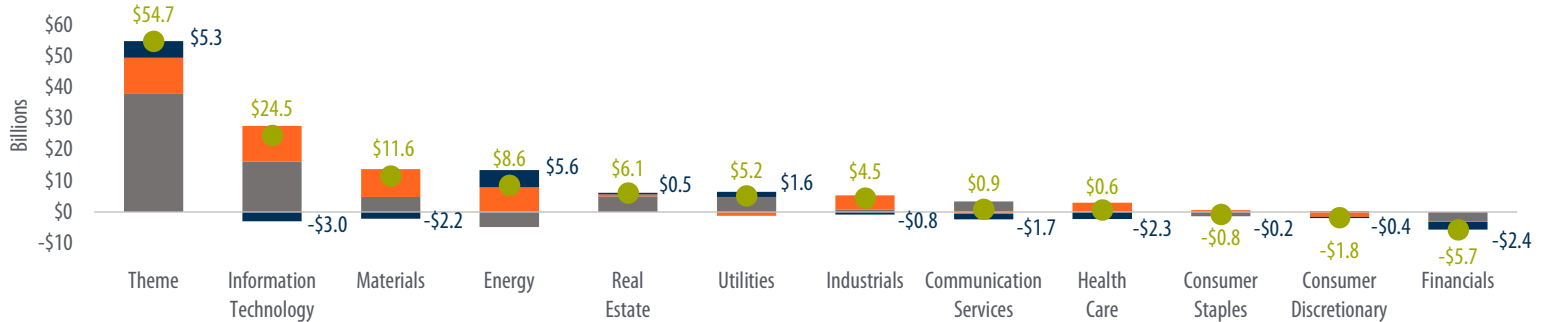
EQUITY ETFs

■ March 2026 ■ January 2026 – February 2026 ■ Prior 9 Months (April 2025 – December 2025) ● 12-Month Total

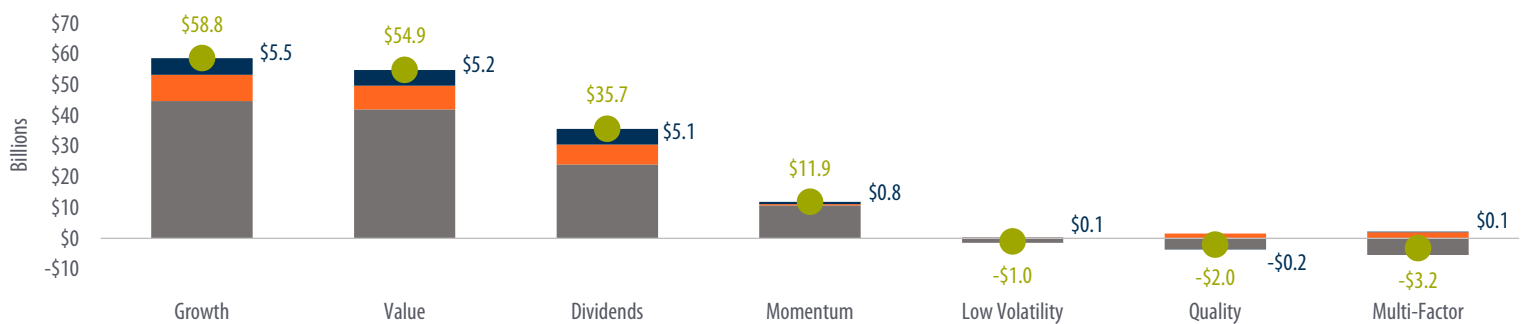
ETF Net Asset Flows by Region



Sector ETFs: Net Asset Flows



Equity Factor ETFs: Net Asset Flows



- US equity ETFs (+\$30.7 billion) had the strongest net inflows in March, while Developed Markets International Equity (+\$19.1 billion), and Global Equity (+\$10.5 billion) also had inflows. Emerging Markets Equity (-\$3.2 billion) had net outflows.
- Equity sector ETFs had \$50 million of net outflows in March. Energy (+\$5.6 billion), Thematic (+\$5.3 billion), Utilities (+\$1.6 billion), and Real Estate (+\$0.5 billion) had the strongest net inflows, while Information Technology (-\$3.0 billion), Financials (-\$2.4 billion), Health Care (-\$2.3 billion), Materials (-\$2.2 billion), and Communication Services (-\$1.7 billion) ETFs had the largest net outflows.
- Net inflows for factor-based equity ETFs totaled \$16.6 billion in March, led by Growth (+\$5.5 billion), Value (+\$5.2 billion), Dividends (+\$5.1 billion), and Momentum (+\$0.8 billion). Over the trailing 12-months, Growth (+\$58.8 billion), Value (+\$54.9 billion), Dividends (+\$35.7 billion), and Momentum (+\$11.9 billion) had the largest net inflows. Multi-Factor (-\$3.2 billion), Quality (-\$2.0 billion), and Low Volatility (-\$1.0 billion) factor-based ETFs saw the largest outflows.

Data Source: FactSet.

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