

Top UIT Investment Strategies

As of 9/30/2021

By Investment Strategy Goal

Domestic Equity

3 Year Composite Performance (9/28/2018 - 9/30/2021)

Strategy Name	Sponsor	Strategy Cumulative Return	Strategy CAGR
BuyWrite			
Blue Chip Covered Call Portfolio	Advisors Asset Management	28.39%	8.81%
Capital Strength Buy-Write Portfolio	First Trust Portfolios	28.37%	8.87%
S&P Dividend Aristocrats Buy-Write Portfolio	First Trust Portfolios	19.60%	6.45%
Capital Appreciation			
Ubiquitous Strategy Portfolio - 15 Month	Advisors Asset Management	88.80%	23.93%
Technology Portfolio	Guggenheim Funds Distributors	87.38%	23.64%
Ubiquitous Opportunities Portfolio	Advisors Asset Management	87.14%	23.58%
Ubiquitous Strategy Portfolio	Advisors Asset Management	87.08%	23.57%
Technology Select Portfolio	First Trust Portfolios	82.58%	22.80%
Blue Chip Multinationals Portfolio	Guggenheim Funds Distributors	67.61%	19.32%
Small/Mid-Cap Advantage Portfolio	Advisors Asset Management	65.25%	18.81%
Cyclical Strength Portfolio	First Trust Portfolios	63.56%	18.53%
Capital Strength Portfolio	First Trust Portfolios	63.24%	18.11%
Financial Opportunities Portfolio	Advisors Asset Management	60.26%	17.51%
Defensive			
Defensive Equity Portfolio	First Trust Portfolios	30.91%	9.58%
Defensive 50 Equities Trust	Hennion & Walsh	21.04%	6.62%
Growth at a Reasonable Price			
Sabrient Small Cap Growth Portfolio	First Trust Portfolios	19.34%	6.66%
Sabrient Baker's Dozen Portfolio	First Trust Portfolios	11.44%	4.22%

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