

Top UIT Investment Strategies

As of 1/31/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

3 Year Composite Performance (1/31/2020 - 1/31/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Socially Responsible					
Sustainable Impact Investing Trust	Hennion & Walsh	29.99%	9.14%	24.95%	7.71%
Thematic					
Building America Strategy Portfolio	Advisors Asset Management	82.50%	22.21%	76.96%	20.96%
Building America Opportunities Portfolio	Advisors Asset Management	78.03%	21.20%	73.29%	20.11%
Richard Bernstein Advisors Tactical Series, American Industrial Renaissance®	First Trust Portfolios	69.23%	19.17%	63.96%	17.92%
American Renaissance Portfolio - A CJL LLC Portfolio	Advisors Asset Management	60.37%	17.05%	55.62%	15.88%
AI, Robotics & Technology Opportunity Portfolio	First Trust Portfolios	54.34%	15.57%	49.82%	14.43%
Agri-Business Opportunities Portfolio	Advisors Asset Management	52.90%	15.21%	47.19%	13.75%
Bulldog Portfolio- A CJL LLC Portfolio	Advisors Asset Management	49.51%	14.35%	44.05%	12.94%
Transformers Opportunities Portfolio	Advisors Asset Management	48.21%	14.01%	42.93%	12.64%
Homebuilders Recovery Select Portfolio	First Trust Portfolios	45.43%	13.30%	40.00%	11.87%
Argus Modern Innovators Trust	Hennion & Walsh	42.59%	12.55%	37.07%	11.08%

The UIT Scorecard reflects performance for advisory and brokerage share classes, and includes all applicable fees and charges for advisory and brokerage share classes.

© 2023 Nasdaq, Inc. All Rights Reserved. Nasdaq® is a registered trademark of Nasdaq, Inc. The information contained above is provided for informational and educational purposes only, and nothing contained herein should be construed as investment advice, either on behalf of a unit investment trust (UIT), particular security or an overall investment strategy. Neither Nasdaq, Inc nor any of its affiliates makes any recommendation to buy or sell any security or any representation about the financial condition of any company. Statements regarding Nasdaq-listed companies or Nasdaq proprietary indexes are not guarantees of future performance. Actual results may differ materially from those expressed or implied. Past performance is not indicative of future results. Investors should undertake their own due diligence and carefully evaluate companies before investing. ADVICE FROM A SECURITIES PROFESSIONAL IS STRONGLY ADVISED.