

Top UIT Investment Strategies

As of 1/31/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

5 Year Composite Performance (1/31/2018 - 1/31/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Thematic					
Bulldog Portfolio- A CJL LLC Portfolio	Advisors Asset Management	78.72%	12.31%	68.89%	11.05%
Argus Modern Innovators Trust	Hennion & Walsh	76.15%	11.99%	61.40%	10.05%
Technological Innovation Portfolio	Guggenheim Funds Distributors	75.60%	11.92%	66.08%	10.68%
American Renaissance Portfolio - A CJL LLC Portfolio	Advisors Asset Management	57.02%	9.44%	48.97%	8.30%
Building America Strategy Portfolio	Advisors Asset Management	55.01%	9.16%	46.49%	7.94%
Building America Opportunities Portfolio	Advisors Asset Management	47.30%	8.05%	38.84%	6.78%
Agri-Business Opportunities Portfolio	Advisors Asset Management	41.07%	7.12%	33.22%	5.90%
Aerospace/Defense Opportunities Portfolio	Advisors Asset Management	31.94%	5.70%	25.34%	4.62%
E-Commerce Ecosystem Trust	Hennion & Walsh	29.01%	5.23%	18.35%	3.43%

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

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