

# Top UIT Investment Strategies

By Investment Strategy Goal

As of 1/31/2023

## 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.

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