

# 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)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
<b>BuyWrite</b>					
Blue Chip Covered Call Portfolio	Advisors Asset Management	19.62%	6.15%	15.61%	4.95%
<b>Contrarian</b>					
Fundamental Equity Contrarians	Hennion & Walsh	38.58%	11.49%	31.20%	9.47%
<b>Capital Appreciation</b>					
Health Care Select Portfolio	First Trust Portfolios	50.34%	14.56%	45.12%	13.22%
Ubiquitous Opportunities Portfolio	Advisors Asset Management	48.75%	14.15%	43.65%	12.83%
SMid Capital Strength Portfolio	First Trust Portfolios	48.72%	14.15%	43.96%	12.91%
Peroni Growth Portfolio	Advisors Asset Management	43.41%	12.77%	38.43%	11.45%
SMid Capital Strength Opportunity Portfolio	First Trust Portfolios	40.78%	12.08%	36.36%	10.89%
Angels Portfolio	Advisors Asset Management	40.24%	11.93%	34.90%	10.49%
Cyclical Strength Portfolio	First Trust Portfolios	38.86%	11.56%	34.03%	10.26%
Brand Favorites Focus Portfolio	Advisors Asset Management	38.62%	11.50%	34.20%	10.30%
Multinational Titans Portfolio	Guggenheim Funds Distributors	38.09%	11.36%	32.88%	9.94%
Financial Opportunities Portfolio	Advisors Asset Management	37.15%	11.10%	32.93%	9.95%

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.