

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)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
BuyWrite					
Blue Chip Covered Call Portfolio	Advisors Asset Management	28.39%	5.13%	21.65%	4.00%
Capital Appreciation					
Ubiquitous Opportunities Portfolio	Advisors Asset Management	103.07%	15.22%	92.39%	13.98%
Angels Portfolio	Advisors Asset Management	82.25%	12.75%	73.05%	11.59%
Technology Portfolio	Guggenheim Funds Distributors	76.49%	12.03%	66.83%	10.78%
Multinational Titans Portfolio	Guggenheim Funds Distributors	64.10%	10.41%	55.07%	9.17%
Peroni Growth Portfolio	Advisors Asset Management	62.90%	10.25%	54.22%	9.05%
Guggenheim US Capital Strength Portfolio	Guggenheim Funds Distributors	62.85%	10.24%	54.22%	9.05%
Brand Favorites Focus Portfolio	Advisors Asset Management	57.16%	9.46%	49.22%	8.33%
Blue Chip Portfolio	Advisors Asset Management	56.88%	9.42%	49.22%	8.33%
Small/Mid-Cap Advantage Portfolio	Advisors Asset Management	54.65%	9.11%	46.72%	7.97%
Ubiquitous Strategy Portfolio - 15 Month	Advisors Asset Management	51.10%	8.61%	39.64%	6.91%
Defensive					
Defensive 50 Equities	Hennion & Walsh	26.66%	4.84%	20.32%	3.77%

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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