

# Top UIT Investment Strategies

By Investment Strategy Goal

As of 4/28/2023

## Investment Category - Domestic Equity

5 Year Composite Performance (4/27/2018 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Low Volatility					
US Low Volatility Strategy Portfolio	Guggenheim Funds Distributors	55.24%	9.07%	46.81%	7.86%
Minimum Volatility Equity Income Portfolio - Advisors Asset A HIMCO Portfolio	Management	40.24%	6.87%	32.70%	5.70%
Socially Responsible					
Sustainable Impact Investing Trust	Hennion & Walsh	61.37%	9.88%	51.09%	8.44%
Thematic					
Bulldog Portfolio- A CJL LLC Portfolio	Advisors Asset Management	87.92%	13.26%	77.58%	11.98%
Argus Modern Innovators Trust	Hennion & Walsh	81.65%	12.42%	69.46%	10.87%
Building America Strategy Portfolio	Advisors Asset Management	64.08%	10.15%	55.78%	9.01%
Building America Opportunities Portfolio	Advisors Asset Management	55.88%	9.03%	46.97%	7.76%
American Renaissance Portfolio - A CJL LLC Portfolio	Advisors Asset Management	52.06%	8.60%	44.68%	7.52%
Agri-Business Opportunities Portfolio	Advisors Asset Management	40.32%	6.87%	32.37%	5.63%
Aerospace/Defense Opportunities Portfolio	Advisors Asset Management	35.39%	6.18%	28.32%	5.04%
Transformers Strategy Portfolio	Advisors Asset Management	32.57%	5.73%	23.25%	4.20%
E-Commerce Ecosystem Trust	Hennion & Walsh	26.22%	4.66%	17.87%	3.24%

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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