

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

3 Year Composite Performance (4/28/2020 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
BuyWrite					
S&P Dividend Aristocrats Buy-Write Portfolio	First Trust Portfolios	42.37%	12.50%	37.27%	11.14%
Capital Strength Buy-Write Portfolio	First Trust Portfolios	36.48%	10.92%	31.77%	9.63%
Blue Chip Covered Call Portfolio	Advisors Asset Management	32.40%	9.81%	28.06%	8.59%
Contrarian					
Fundamental Equity Contrarians	Hennion & Walsh	47.62%	13.86%	41.62%	12.30%
Capital Appreciation					
Multinational Titans Portfolio	Guggenheim Funds Distributors	62.64%	17.60%	56.39%	16.07%
SMid Capital Strength Portfolio	First Trust Portfolios	60.74%	17.14%	55.16%	15.77%
Core Holdings Growth Trust	First Trust Portfolios	59.21%	16.77%	56.09%	16.00%
Tactical Alpha Portfolio	First Trust Portfolios	56.89%	16.20%	51.96%	14.97%
Financial Opportunities Portfolio	Advisors Asset Management	56.10%	16.00%	51.71%	14.91%
Cyclical Strength Portfolio	First Trust Portfolios	55.07%	15.75%	49.70%	14.39%
Angels Portfolio	Advisors Asset Management	55.05%	15.74%	50.10%	14.50%
Technology Select Portfolio	First Trust Portfolios	54.34%	15.57%	49.40%	14.32%
Capital Strength Portfolio	First Trust Portfolios	53.70%	15.40%	48.62%	14.12%
Core Angels Portfolio	Advisors Asset Management	53.10%	15.26%	47.29%	13.78%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

3 Year Composite Performance (4/28/2020 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Defensive					
Defensive Equity Portfolio	First Trust Portfolios	47.66%	13.87%	42.54%	12.54%
Defensive 50 Equities	Hennion & Walsh	27.15%	8.34%	23.09%	7.17%
Growth at a Reasonable Price					
Sabrient Small Cap Growth Portfolio	First Trust Portfolios	85.32%	22.83%	79.54%	21.54%
Sabrient Baker's Dozen Portfolio	First Trust Portfolios	57.55%	16.36%	52.81%	15.18%
Income & Capital Appreciation					
S&P Target SMid 60 Portfolio	First Trust Portfolios	111.44%	28.35%	104.13%	26.85%
Target Diversified Dividend Portfolio	First Trust Portfolios	85.11%	22.78%	78.70%	21.35%
Target High Quality Dividend Portfolio	First Trust Portfolios	83.62%	22.45%	77.27%	21.03%
Target Dividend Blend Portfolio	First Trust Portfolios	79.15%	21.45%	72.96%	20.04%
Target Dividend Double Play	First Trust Portfolios	69.97%	19.34%	64.10%	17.95%
Bahl & Gaynor smig (Small/Mid Cap Income Advisors Asset Growth) Portfolio	Advisors Asset Management	65.85%	18.37%	60.10%	16.99%
Nasdaq® Dividend Achievers 25 Portfolio	First Trust Portfolios	64.43%	18.03%	59.60%	16.86%
Target Focus Four Portfolio	First Trust Portfolios	63.71%	17.86%	58.04%	16.48%
Equity Income Opportunity Portfolio	First Trust Portfolios	63.16%	17.73%	58.37%	16.56%
Dividend Strength Portfolio	First Trust Portfolios	62.00%	17.45%	56.80%	16.18%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

3 Year Composite Performance (4/28/2020 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income - Dividend					
US 50 Dividend Strategy Portfolio	Guggenheim Funds Distributors	63.61%	17.83%	57.96%	16.46%
Guggenheim US High Dividend Strategy Portfolio	Guggenheim Funds Distributors	63.23%	17.74%	57.66%	16.39%
Dividend Sustainability Portfolio - A HIMCO Portfolio	Advisors Asset Management	40.86%	12.10%	36.04%	10.80%
Select DSIP Portfolio	First Trust Portfolios	39.06%	11.62%	34.51%	10.39%
Stonebridge Preferred Income Portfolio	First Trust Portfolios	10.38%	3.35%	6.51%	2.13%
Preferreds Plus	Hennion & Walsh	-3.18%	-1.07%	-6.75%	-2.30%
Preferred Income Portfolio	First Trust Portfolios	-3.24%	-1.09%	-6.59%	-2.25%
Flaherty & Crumrine Preferred Portfolio	Guggenheim Funds Distributors	-3.70%	-1.25%	-7.77%	-2.66%
Low Volatility					
Value Line® Target Safety 30 Portfolio	First Trust Portfolios	40.30%	11.95%	35.46%	10.65%
Low Volatility Portfolio	First Trust Portfolios	39.23%	11.66%	35.17%	10.57%
US Low Volatility Strategy Portfolio	Guggenheim Funds Distributors	33.98%	10.24%	29.49%	9.00%
Minimum Volatility Equity Income Portfolio - A HIMCO Portfolio	Advisors Asset Management	31.93%	9.68%	27.41%	8.41%
Momentum					
Dorsey Wright Relative Strength Top 50	First Trust Portfolios	32.51%	9.84%	28.36%	8.68%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

3 Year Composite Performance (4/28/2020 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Socially Responsible					
Sustainable Impact Investing Trust	Hennion & Walsh	40.40%	11.98%	34.98%	10.51%
Thematic					
Building America Opportunities Portfolio	Advisors Asset Management	136.74%	33.28%	130.59%	32.11%
Building America Strategy Portfolio	Advisors Asset Management	123.39%	30.72%	117.20%	29.51%
Homebuilders Recovery Select Portfolio	First Trust Portfolios	114.43%	28.95%	107.34%	27.52%
Richard Bernstein Advisors Tactical Series, American Industrial Renaissance®	First Trust Portfolios	107.00%	27.45%	99.51%	25.89%
U.S. Infrastructure Portfolio	First Trust Portfolios	100.06%	26.01%	92.00%	24.29%
American Renaissance Portfolio - A CJL LLC Portfolio	Advisors Asset Management	74.79%	20.46%	70.09%	19.37%
AI, Robotics & Technology Opportunity Portfolio	First Trust Portfolios	74.50%	20.39%	69.37%	19.20%
Agri-Business Opportunities Portfolio	Advisors Asset Management	69.08%	19.13%	62.80%	17.64%
Bulldog Portfolio- A CJL LLC Portfolio	Advisors Asset Management	57.87%	16.44%	52.11%	15.00%
American Agenda Portfolio	First Trust Portfolios	56.06%	15.99%	51.07%	14.74%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

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

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
BuyWrite					
Blue Chip Covered Call Portfolio	Advisors Asset Management	28.66%	5.02%	22.00%	3.91%
Capital Appreciation					
Technology Portfolio	Guggenheim Funds Distributors	88.04%	13.25%	77.76%	11.98%
Ubiquitous Strategy Portfolio	Advisors Asset Management	80.28%	12.48%	69.97%	11.17%
Multinational Titans Portfolio	Guggenheim Funds Distributors	78.98%	12.09%	68.98%	10.81%
Guggenheim US Capital Strength Portfolio	Guggenheim Funds Distributors	74.26%	11.51%	64.94%	10.29%
Ubiquitous Strategy Portfolio - 15 Month	Advisors Asset Management	71.20%	11.33%	60.48%	9.90%
Brand Favorites Focus Portfolio	Advisors Asset Management	67.00%	10.65%	58.57%	9.51%
Blue Chip Portfolio	Advisors Asset Management	58.01%	9.38%	50.17%	8.27%
Core Angels Portfolio	Advisors Asset Management	57.90%	9.33%	48.85%	8.05%
Small/Mid-Cap Advantage Portfolio	Advisors Asset Management	55.49%	9.01%	47.94%	7.93%
Angels Portfolio	Advisors Asset Management	51.59%	8.46%	43.94%	7.34%
Defensive					
Defensive 50 Equities	Hennion & Walsh	44.63%	7.67%	37.39%	6.57%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

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
Income & Capital Appreciation					
Blue Chip Growth Portfolio	Guggenheim Funds Distributors	89.08%	13.37%	78.32%	12.05%
S&P Dividend Aristocrats Select 25 Strategy Portfolio	Guggenheim Funds Distributors	62.93%	10.02%	54.09%	8.86%
The Dividend Income Value Strategy Portfolio	Advisors Asset Management	61.98%	9.96%	53.35%	8.76%
Bahl & Gaynor Income Growth Portfolio	Advisors Asset Management	60.12%	9.63%	51.58%	8.44%
Bahl & Gaynor smig (Small/Mid Cap Income Growth) Portfolio	Advisors Asset Management	59.86%	9.72%	51.36%	8.53%
Large-Cap Core Portfolio	Guggenheim Funds Distributors	58.95%	9.49%	50.48%	8.29%
Diversified Dividend & Income Portfolio	Guggenheim Funds Distributors	49.81%	8.21%	41.87%	7.04%
Utilities Portfolio - A HIMCO Portfolio	Advisors Asset Management	45.73%	7.93%	38.26%	6.80%
Argus Dividend Growers Total Return	Hennion & Walsh	43.06%	7.26%	35.60%	6.12%
Morningstar Dividend Yield Select Trust	Hennion & Walsh	36.57%	6.38%	29.70%	5.29%
Income - Dividend					
Dividend Sustainability Portfolio - A HIMCO Portfolio	Advisors Asset Management	49.79%	8.29%	42.36%	7.20%
Guggenheim US High Dividend Strategy Portfolio	Guggenheim Funds Distributors	47.80%	7.87%	39.71%	6.67%
US 50 Dividend Strategy Portfolio	Guggenheim Funds Distributors	25.20%	4.39%	18.36%	3.27%
Flaherty & Crumrine Preferred Portfolio	Guggenheim Funds Distributors	2.99%	0.49%	-2.50%	-0.60%
Preferreds Plus	Hennion & Walsh	1.41%	0.23%	-4.50%	-0.97%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

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.

© 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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

10 Year Composite Performance (4/26/2013 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Ubiquitous Strategy Portfolio	Advisors Asset Management	346.69%	15.69%	268.63%	13.49%
Technology Portfolio	Guggenheim Funds Distributors	333.32%	15.43%	273.10%	13.71%
Multinational Titans Portfolio	Guggenheim Funds Distributors	217.16%	11.91%	177.07%	10.41%
Guggenheim US Capital Strength Portfolio	Guggenheim Funds Distributors	213.67%	11.78%	167.46%	10.01%
Brand Favorites Focus Portfolio	Advisors Asset Management	182.57%	10.71%	143.85%	9.09%
Blue Chip Portfolio	Advisors Asset Management	173.53%	10.30%	136.57%	8.71%
Angels Portfolio	Advisors Asset Management	172.58%	10.25%	136.88%	8.71%
Health Care Opportunities Portfolio	Advisors Asset Management	172.53%	10.44%	135.72%	8.85%
Peroni Growth Portfolio	Advisors Asset Management	136.39%	8.77%	104.57%	7.21%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

10 Year Composite Performance (4/26/2013 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income & Capital Appreciation					
Blue Chip Growth Portfolio	Guggenheim Funds Distributors	257.72%	13.30%	202.63%	11.42%
Large-Cap Core Portfolio	Guggenheim Funds Distributors	183.59%	10.63%	144.74%	9.01%
The Dividend Income Value Strategy Portfolio	Advisors Asset Management	179.85%	10.59%	142.15%	9.00%
Diversified Dividend & Income Portfolio	Guggenheim Funds Distributors	164.01%	9.97%	129.21%	8.43%
Dividend Growth Portfolio	Guggenheim Funds Distributors	162.54%	9.89%	130.86%	8.49%
Utilities Portfolio - A HIMCO Portfolio	Advisors Asset Management	121.23%	8.20%	84.34%	6.24%
Dow Jones Value RBP Dividend Focus Portfolio	Guggenheim Funds Distributors	117.58%	7.83%	87.66%	6.25%
The Dow® Value Ten Portfolio	Advisors Asset Management	113.93%	7.64%	84.86%	6.08%
High 50® Dividend Strategy Portfolio	Advisors Asset Management	83.01%	5.97%	58.43%	4.45%
Dividend Advantage Portfolio	Advisors Asset Management	63.27%	4.82%	40.87%	3.28%
Income - Dividend					
Guggenheim US High Dividend Strategy Portfolio	Guggenheim Funds Distributors	146.62%	9.20%	112.89%	7.60%
Flaherty & Crumrine Preferred Portfolio	Guggenheim Funds Distributors	23.69%	2.04%	9.86%	0.84%
Low Volatility					
US Low Volatility Strategy Portfolio	Guggenheim Funds Distributors	143.23%	9.11%	106.86%	7.35%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

10 Year Composite Performance (4/26/2013 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Thematic					
Agri-Business Opportunities Portfolio	Advisors Asset Management	108.69%	7.48%	81.49%	5.99%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Global Equity

3 Year Composite Performance (4/28/2020 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Energy Select Portfolio	First Trust Portfolios	140.31%	33.94%	132.02%	32.39%
Dow Jones Global Titans Portfolio	First Trust Portfolios	72.52%	19.94%	66.95%	18.63%
Financials Select Portfolio	First Trust Portfolios	59.24%	16.78%	53.71%	15.41%
Global Technology Portfolio	Advisors Asset Management	51.09%	14.75%	46.27%	13.51%
Worldwide Economic Recovery Portfolio	First Trust Portfolios	49.95%	14.46%	39.78%	11.81%
Market Strength Allocation Select Portfolio	First Trust Portfolios	47.63%	13.87%	42.63%	12.57%
Market Strength Allocation Opportunity Portfolio	First Trust Portfolios	45.84%	13.40%	41.63%	12.30%
Income & Capital Appreciation					
Global Basic Materials Portfolio	Advisors Asset Management	88.15%	23.45%	83.10%	22.34%
Global Dividend Strategy Portfolio - A HIMCO Portfolio	Advisors Asset Management	72.38%	19.90%	66.54%	18.53%
Technology Dividend Portfolio	First Trust Portfolios	60.75%	17.14%	55.62%	15.88%
Global Dividend Portfolio	First Trust Portfolios	57.93%	16.45%	52.78%	15.17%
High Dividend Equity Allocation Portfolio	First Trust Portfolios	56.63%	16.13%	51.16%	14.77%
Target Global Dividend Leaders Portfolio	First Trust Portfolios	53.36%	15.32%	48.07%	13.98%
Strategic High 80 Dividend Portfolio	Advisors Asset Management	51.70%	14.90%	46.54%	13.59%
Richard Bernstein Advisors Global Dividend Kings®	First Trust Portfolios	46.83%	13.66%	41.96%	12.39%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Global Equity

3 Year Composite Performance (4/28/2020 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Socially Responsible					
Next Generation ESG Strategy Portfolio - A HIMCO Portfolio	Advisors Asset Management	47.06%	13.72%	41.97%	12.39%
Aegon Sustainable Equity Portfolio	Advisors Asset Management	37.47%	11.19%	32.70%	9.89%
Thematic					
Digital World Leaders Strategy Portfolio	First Trust Portfolios	51.41%	14.83%	46.59%	13.60%
NextGen Communications and Technology Portfolio	First Trust Portfolios	27.85%	8.54%	24.08%	7.46%

Investment Category - Global Equity

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

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Global Technology Portfolio	Advisors Asset Management	74.70%	11.65%	66.40%	10.57%
Income & Capital Appreciation					
Global Dividend Strategy Portfolio - A HIMCO Portfolio	Advisors Asset Management	46.56%	7.86%	38.87%	6.71%
Global Basic Materials Portfolio	Advisors Asset Management	41.35%	7.05%	34.50%	5.99%
Strategic High 80 Dividend Portfolio	Advisors Asset Management	18.91%	3.38%	12.52%	2.25%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Global Equity

10 Year Composite Performance (4/26/2013 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Global Technology Portfolio	Advisors Asset Management	325.28%	15.30%	268.03%	13.65%
Income & Capital Appreciation					
Global Basic Materials Portfolio	Advisors Asset Management	108.42%	7.34%	80.34%	5.80%
Strategic High 80 Dividend Portfolio	Advisors Asset Management	52.28%	4.09%	31.44%	2.57%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Foreign Equity

3 Year Composite Performance (4/28/2020 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
International Capital Strength Portfolio	First Trust Portfolios	44.86%	13.15%	40.21%	11.93%
Guggenheim European Capital Strength Portfolio	Guggenheim Funds Distributors	34.66%	10.43%	29.48%	8.99%
Strategic International Opportunity Portfolio	First Trust Portfolios	33.82%	10.20%	29.70%	9.05%
Todd International Intrinsic Value Portfolio	Advisors Asset Management	27.90%	8.55%	23.82%	7.38%
Emerging Markets Strength Portfolio	First Trust Portfolios	15.48%	4.91%	12.16%	3.90%
Income & Capital Appreciation					
European Deep Value Dividend Portfolio	First Trust Portfolios	62.05%	17.46%	57.49%	16.34%
International High Dividend Equity Portfolio	First Trust Portfolios	58.84%	16.68%	53.73%	15.41%
International High 30 Dividend Portfolio	Advisors Asset Management	43.14%	12.70%	38.27%	11.41%
European Select Portfolio - A CJL LLC Portfolio	Advisors Asset Management	38.52%	11.47%	33.79%	10.19%
Guggenheim Emerging Markets Dividend Strategy Portfolio	Guggenheim Funds Distributors	29.80%	9.08%	25.48%	7.86%
S&P International Dividend Aristocrats Portfolio	First Trust Portfolios	28.06%	8.59%	24.14%	7.47%
Income - Dividend					
Emerging Markets Dividend Portfolio	Advisors Asset Management	14.61%	4.65%	10.51%	3.39%
Momentum					
Dorsey Wright International Momentum	Hennion & Walsh	46.32%	13.53%	41.65%	12.31%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Foreign Equity

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

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Guggenheim European Capital Strength Portfolio	Guggenheim Funds Distributors	23.19%	4.14%	16.62%	3.00%
Todd International Intrinsic Value Portfolio	Advisors Asset Management	-5.35%	-1.13%	-11.76%	-2.51%
Income & Capital Appreciation					
European Select Portfolio - A CJL LLC Portfolio	Advisors Asset Management	13.98%	2.65%	7.86%	1.52%
International High 30 Dividend Portfolio	Advisors Asset Management	12.61%	2.33%	6.56%	1.21%
Guggenheim Emerging Markets Dividend Strategy Portfolio	Guggenheim Funds Distributors	-8.09%	-1.79%	-13.23%	-2.91%
Income - Dividend					
Emerging Markets Dividend Portfolio	Advisors Asset Management	-2.44%	-0.65%	-7.45%	-1.70%
Momentum					
Dorsey Wright International Momentum	Hennion & Walsh	16.39%	3.18%	10.26%	2.07%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Foreign Equity

10 Year Composite Performance (4/26/2013 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Guggenheim European Capital Strength Portfolio	Guggenheim Funds Distributors	80.39%	5.91%	53.86%	4.24%
Income & Capital Appreciation					
International High 30 Dividend Portfolio	Advisors Asset Management	17.69%	1.48%	1.68%	0.00%
Guggenheim Emerging Markets Dividend Strategy Portfolio	Guggenheim Funds Distributors	1.67%	0.01%	-12.61%	-1.49%
Income - Dividend					
Emerging Markets Dividend Portfolio	Advisors Asset Management	7.94%	0.54%	-7.98%	-1.05%

Investment Category - Fund of Funds - ETFs

3 Year Composite Performance (4/28/2020 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Aggressive Income					
FT High Income Model Portfolio	First Trust Portfolios	-0.65%	-0.22%	-3.79%	-1.28%
Capital Appreciation					
First Trust® ETF Allocation Portfolio	First Trust Portfolios	33.99%	10.24%	29.86%	9.10%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - ETFs

3 Year Composite Performance (4/28/2020 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income & Capital Appreciation					
FT Income Portfolio	First Trust Portfolios	32.91%	9.95%	28.83%	8.81%
ETF Growth and Income Portfolio	First Trust Portfolios	27.54%	8.45%	23.51%	7.29%
Limited Duration Fixed Income ETF Portfolio	First Trust Portfolios	6.90%	2.25%	3.63%	1.20%
Income - Interest					
Diversified Credit Portfolio of ETFs	Guggenheim Funds Distributors	-1.12%	-0.38%	-4.94%	-1.67%
Diversified Fixed Income ETF Portfolio	First Trust Portfolios	-3.85%	-1.30%	-6.64%	-2.26%

Investment Category - Fund of Funds - ETFs

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

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income - Interest					
Diversified Credit Portfolio of ETFs	Guggenheim Funds Distributors	1.88%	0.28%	-3.92%	-0.89%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - ETFs

10 Year Composite Performance (4/26/2013 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income - Interest					
Diversified Credit Portfolio of ETFs	Guggenheim Funds Distributors	10.37%	0.94%	-5.16%	-0.58%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - CEFs

3 Year Composite Performance (4/28/2020 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Aggressive Income					
Cohen & Steers MLP, Midstream & Energy Income Closed-End Portfolio	Advisors Asset Management	93.93%	24.70%	88.75%	23.58%
CEFA Select BDC	Hennion & Walsh	71.05%	19.59%	64.79%	18.12%
Business Development Company Opportunities Portfolio	Advisors Asset Management	70.01%	19.35%	65.50%	18.29%
Cohen & Steers Senior Variable Rate and Income Closed-End Portfolio	Advisors Asset Management	29.00%	8.86%	25.53%	7.87%
Closed-End Senior Loan & Income Portfolio	Guggenheim Funds Distributors	27.23%	8.36%	21.82%	6.80%
Diversified High Income Closed-End Portfolio	First Trust Portfolios	26.35%	8.11%	21.66%	6.75%
Closed-End Corporate High Yield & Income Portfolio	Guggenheim Funds Distributors	23.46%	7.28%	18.61%	5.85%
High-Yield Income Closed-End Portfolio	First Trust Portfolios	22.74%	7.07%	18.57%	5.84%
Global Bond Income Closed-End Portfolio	First Trust Portfolios	2.49%	0.82%	-1.30%	-0.43%

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

© 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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - CEFs

3 Year Composite Performance (4/28/2020 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income & Capital Appreciation					
Dividend & Income Select Closed-End Portfolio	First Trust Portfolios	47.53%	13.84%	42.53%	12.54%
Global Equity Income Closed-End Portfolio	First Trust Portfolios	41.00%	12.14%	36.68%	10.98%
U.S. Equity Closed-End Portfolio	First Trust Portfolios	40.10%	11.89%	34.94%	10.51%
Cohen & Steers Equity Dividend & Income Closed-End Portfolio	Advisors Asset Management	36.18%	10.84%	32.37%	9.80%
Closed-End Convertible & Income Portfolio	Guggenheim Funds Distributors	35.68%	10.71%	30.44%	9.26%
Tactical Income Closed-End Portfolio	Advisors Asset Management	33.26%	10.04%	28.91%	8.83%
Cohen & Steers Convertible and Income Closed-End Portfolio	Advisors Asset Management	31.19%	9.47%	27.39%	8.41%
Strategic Income Closed-End Portfolio	First Trust Portfolios	24.53%	7.59%	21.36%	6.67%
Strategic Income Portfolio	Guggenheim Funds Distributors	23.92%	7.41%	19.01%	5.97%
Diversified Income Wave Portfolio	Guggenheim Funds Distributors	23.46%	7.28%	19.49%	6.12%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - CEFs

3 Year Composite Performance (4/28/2020 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income - Interest					
Municipal Income Opportunities Closed-End Portfolio	First Trust Portfolios	9.79%	3.16%	5.94%	1.94%
Closed-End Income & Treasury Limited Duration Portfolio	Guggenheim Funds Distributors	4.33%	1.42%	0.79%	0.26%
Cohen & Steers Municipal Closed-End Portfolio	Advisors Asset Management	-1.98%	-0.66%	-4.81%	-1.63%
National Municipal Portfolio of CEFs	Guggenheim Funds Distributors	-2.92%	-0.98%	-6.57%	-2.24%
New York Municipal Portfolio of CEFs	Guggenheim Funds Distributors	-4.79%	-1.62%	-8.66%	-2.97%
Tax Free Income Trust	Hennion & Walsh	-5.28%	-1.79%	-9.06%	-3.12%
California Municipal Portfolio of Closed-End Funds	Hennion & Walsh	-5.72%	-1.94%	-9.42%	-3.24%
Cohen & Steers California Municipal Closed-End Portfolio	Advisors Asset Management	-6.36%	-2.17%	-9.09%	-3.13%
Low Valuation/Discount					
Guggenheim Discount Opportunity Strategy Portfolio of CEFs	Guggenheim Funds Distributors	24.65%	7.62%	20.23%	6.33%
Volatility Hedged					
Cohen & Steers Covered Call & Income Strategies Closed-End Portfolio	Advisors Asset Management	37.40%	11.17%	33.23%	10.04%
Covered Call Select Closed-End Portfolio	First Trust Portfolios	36.61%	10.96%	32.03%	9.71%
Closed-End Covered Call and Income Portfolio	Guggenheim Funds Distributors	34.90%	10.49%	30.22%	9.20%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - CEFs

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

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Aggressive Income					
CEFA Select BDC	Hennion & Walsh	31.07%	5.41%	23.41%	4.15%
Business Development Company Opportunities Portfolio	Advisors Asset Management	26.22%	4.65%	20.11%	3.61%
Closed-End Corporate High Yield & Income Portfolio	Guggenheim Funds Distributors	4.69%	0.84%	-1.38%	-0.36%
Cohen & Steers Senior Variable Rate and Income Closed-End Portfolio	Advisors Asset Management	4.17%	0.76%	-0.89%	-0.24%
Closed-End Senior Loan & Income Portfolio	Guggenheim Funds Distributors	2.39%	0.41%	-3.50%	-0.77%
Cohen & Steers MLP, Midstream & Energy Income Closed-End Portfolio	Advisors Asset Management	-22.61%	-5.24%	-26.37%	-6.18%
Income & Capital Appreciation					
Closed-End Convertible & Income Portfolio	Guggenheim Funds Distributors	28.61%	5.06%	21.64%	3.89%
Cohen & Steers Convertible and Income Closed-End Portfolio	Advisors Asset Management	28.54%	5.01%	22.00%	3.92%
Cohen & Steers Equity Dividend & Income Closed-End Portfolio	Advisors Asset Management	15.32%	2.71%	9.61%	1.67%
Strategic Income Portfolio	Guggenheim Funds Distributors	10.32%	1.88%	3.79%	0.64%
Tactical Income Closed-End Portfolio	Advisors Asset Management	9.48%	1.65%	3.52%	0.52%
Diversified Income Wave Portfolio	Guggenheim Funds Distributors	3.90%	0.71%	-1.55%	-0.37%
Portfolio of Closed-End Fund Opportunities	Hennion & Walsh	-1.32%	-0.38%	-6.96%	-1.54%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - CEFs

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

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income - Interest					
Cohen & Steers Municipal Closed-End Portfolio	Advisors Asset Management	0.64%	0.04%	-4.45%	-0.99%
Closed-End Income & Treasury Limited Duration Portfolio	Guggenheim Funds Distributors	0.40%	0.02%	-5.04%	-1.09%
Cohen & Steers California Municipal Closed-End Portfolio	Advisors Asset Management	-0.88%	-0.28%	-5.62%	-1.25%
National Municipal Portfolio of CEFs	Guggenheim Funds Distributors	-1.94%	-0.46%	-7.64%	-1.65%
New York Municipal Portfolio of CEFs	Guggenheim Funds Distributors	-3.57%	-0.76%	-8.97%	-1.90%
California Municipal Portfolio of Closed-End Funds	Hennion & Walsh	-5.43%	-1.20%	-11.17%	-2.43%
Tax Free Income Trust	Hennion & Walsh	-9.60%	-2.08%	-14.69%	-3.21%
Low Valuation/Discount					
Guggenheim Discount Opportunity Strategy Portfolio of CEFs	Guggenheim Funds Distributors	11.50%	2.07%	4.92%	0.84%
Volatility Hedged					
Cohen & Steers Covered Call & Income Strategies Closed-End Portfolio	Advisors Asset Management	27.10%	4.79%	20.32%	3.65%
Closed-End Covered Call and Income Portfolio	Guggenheim Funds Distributors	24.34%	4.36%	17.10%	3.12%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - CEFs

10 Year Composite Performance (4/26/2013 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Aggressive Income					
Business Development Company Opportunities Portfolio	Advisors Asset Management	24.28%	2.03%	7.13%	0.52%
Closed-End Corporate High Yield & Income Portfolio	Guggenheim Funds Distributors	18.70%	1.65%	5.46%	0.46%
Cohen & Steers Senior Variable Rate and Income Closed-End Portfolio	Advisors Asset Management	15.91%	1.42%	1.52%	0.08%
Closed-End Senior Loan & Income Portfolio	Guggenheim Funds Distributors	14.00%	1.25%	0.56%	-0.01%
Income & Capital Appreciation					
Closed-End Convertible & Income Portfolio	Guggenheim Funds Distributors	71.87%	5.45%	51.16%	4.11%
Cohen & Steers Equity Dividend & Income Closed-End Portfolio	Advisors Asset Management	52.07%	4.07%	30.89%	2.52%
Tactical Income Closed-End Portfolio	Advisors Asset Management	36.00%	2.93%	18.71%	1.54%
Strategic Income Portfolio	Guggenheim Funds Distributors	33.70%	2.82%	17.88%	1.54%
Diversified Income Wave Portfolio	Guggenheim Funds Distributors	25.69%	2.23%	11.01%	0.97%
Portfolio of Closed-End Fund Opportunities	Hennion & Walsh	2.35%	0.12%	-12.49%	-1.44%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fund of Funds - CEFs

10 Year Composite Performance (4/26/2013 - 4/28/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income - Interest					
Closed-End Income & Treasury Limited Duration Portfolio	Guggenheim Funds Distributors	9.74%	0.89%	-3.21%	-0.37%
Cohen & Steers Municipal Closed-End Portfolio	Advisors Asset Management	7.42%	0.66%	-6.33%	-0.71%
National Municipal Portfolio of CEFs	Guggenheim Funds Distributors	4.74%	0.42%	-7.78%	-0.85%
Cohen & Steers California Municipal Closed-End Portfolio	Advisors Asset Management	1.27%	0.06%	-15.66%	-1.75%
New York Municipal Portfolio of CEFs	Guggenheim Funds Distributors	-3.28%	-0.38%	-13.29%	-1.46%
Tax Free Income Trust	Hennion & Walsh	-13.16%	-1.45%	-24.16%	-2.78%
Low Valuation/Discount					
Guggenheim Discount Opportunity Strategy Portfolio of CEFs	Guggenheim Funds Distributors	34.61%	2.86%	16.17%	1.36%
Volatility Hedged					
Closed-End Covered Call and Income Portfolio	Guggenheim Funds Distributors	88.17%	6.33%	65.00%	4.94%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Multi-Asset Allocation

3 Year Composite Performance (4/28/2020 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Precious Metals & Miners Portfolio	Guggenheim Funds Distributors	17.63%	5.56%	13.20%	4.22%
Precious Metals Select Portfolio	First Trust Portfolios	15.08%	4.79%	9.86%	3.18%
Income & Capital Appreciation					
Inflation Hedge Portfolio	First Trust Portfolios	74.93%	20.49%	67.77%	18.82%
Interest Rate Hedge Portfolio	First Trust Portfolios	52.37%	15.07%	47.56%	13.85%
Balanced Portfolio	Advisors Asset Management	51.93%	14.96%	46.15%	13.48%
Strategic Dividend Select Portfolio	First Trust Portfolios	51.28%	14.79%	45.94%	13.43%
60/40 Asset Allocation Portfolio	Advisors Asset Management	43.82%	12.88%	39.43%	11.72%
Balanced Income Select Portfolio	First Trust Portfolios	37.86%	11.30%	33.05%	9.99%
Tactical Income Portfolio	First Trust Portfolios	37.07%	11.08%	32.32%	9.78%
Total Income Portfolio	Guggenheim Funds Distributors	35.79%	10.74%	30.57%	9.30%
Dynamic Sector Income Trust	Hennion & Walsh	34.65%	10.42%	29.71%	9.06%
75/25 Strategic Allocation Portfolio	First Trust Portfolios	34.00%	10.25%	30.12%	9.17%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Multi-Asset Allocation

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

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Precious Metals Select Portfolio	First Trust Portfolios	63.23%	10.30%	52.42%	8.79%
Precious Metals & Miners Portfolio	Guggenheim Funds Distributors	39.59%	6.93%	31.80%	5.71%
Income & Capital Appreciation					
60/40 Asset Allocation Portfolio	Advisors Asset Management	37.60%	6.49%	29.69%	5.23%
Floating Rate & Dividend Growth Portfolio	Guggenheim Funds Distributors	30.56%	5.38%	23.21%	4.16%
Core Four 60/40 Retirement Portfolio	Guggenheim Funds Distributors	28.51%	5.01%	20.69%	3.70%
Balanced Portfolio	Advisors Asset Management	23.34%	4.10%	16.03%	2.83%
Global Balanced Income Builder Portfolio	Guggenheim Funds Distributors	13.85%	2.52%	7.14%	1.28%
Total Income Portfolio	Guggenheim Funds Distributors	11.39%	2.06%	5.12%	0.89%
Dynamic Sector Income Trust	Hennion & Walsh	3.79%	0.62%	-2.26%	-0.58%
Strategic Growth & Income	Hennion & Walsh	-1.23%	-0.34%	-6.97%	-1.53%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Multi-Asset Allocation

10 Year Composite Performance (4/26/2013 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Precious Metals Select Portfolio	First Trust Portfolios	4.81%	0.41%	-10.04%	-1.12%
Precious Metals & Miners Portfolio	Guggenheim Funds Distributors	-3.75%	-0.43%	-15.90%	-1.77%
Income & Capital Appreciation					
Guggenheim Balanced Income Builder Portfolio	Guggenheim Funds Distributors	64.09%	4.96%	40.06%	3.31%
Balanced Portfolio	Advisors Asset Management	61.93%	4.72%	39.74%	3.19%
Global Balanced Income Builder Portfolio	Guggenheim Funds Distributors	41.90%	3.44%	18.34%	1.58%
Dynamic Sector Income Trust	Hennion & Walsh	12.45%	1.04%	-2.57%	-0.40%
Strategic Growth & Income	Hennion & Walsh	5.46%	0.42%	-11.98%	-1.38%

Investment Category - Fixed Income - Tax Free

3 Year Composite Performance (4/28/2020 - 4/28/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income - Interest					
Select Quality Municipal Portfolio	Guggenheim Funds Distributors	-19.08%	-6.81%	-19.64%	-7.03%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Fixed Income - Tax Free

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

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Income - Interest					
Select Quality Municipal Portfolio	Guggenheim Funds Distributors	-25.92%	-5.83%	-26.43%	-5.96%

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.

Top UIT Investment Strategies

As of 4/28/2023

By Investment Strategy Goal

Investment Category - Disclosure

Data Sources: First Trust Portfolios, Guggenheim Investments, Advisors Asset Management, Hennion & Walsh.

Cumulative returns of the unit investment trust strategy are based on distributions received in cash and recognized on the ex-dividend date during the life of the unit investment trust. Historical strategy performance is derived by utilizing the average daily performance of the outstanding series of a UIT strategy. Returns are calculated excluding the Transactional Sales Charges for each unit investment trust series but does reflect the Creation & Development Fee and trust operating expenses as incurred for each unit investment trust series included in the calculation. The returns do not adjust for taxes. If adjusted or taxes, the effects of taxation would reduce the performance depicted.

Average Annual Return (CAGR). The return an investment provides over a period of time expressed as a time-weighted annual percentage. The rate of annual return is measured against the initial amount of the investment and represents a geometric mean rather than a simple arithmetic mean.

Past performance is no indicator of future results. Investment return and principal value will fluctuate with changes in market conditions. We make no assurance that any investment product based on an index will accurately track index performance or provide positive investment returns. An investment in units of a unit investment trust and continuing the investment in units of

subsequent series of unit investment trust strategy, when redeemed may be worth more or less than their original investment.

Any written analysis appearing herein are statements of opinion and not statements of fact. The data and information contained herein has been obtained from sources believed to be reliable. However, we do not warrant the accuracy or completeness of any information, data or analysis contained herein and we provide no assurance that the content of this material is, in fact, accurate. This information, data, analysis and any opinions contained herein are for informational purposes only and does not constitute investment advice or a recommendation to buy, sell or hold a securities product or strategy.

All investments carry a certain degree of risk and there is no assurance that an investment will provide positive performance over any time period. Past performance is not indicative of future results and should never be relied upon in making an investment decision or recommendation.

Investors should consider the investment objectives, risks, charges and expenses of the unit investment trust(s) carefully before investing. The prospectus contains this and other information about the unit investment trust(s). This may not contain a complete discussion of investment terms or risks and you should only rely on the information contained in relevant prospectus and/or offering documentation prior to purchasing an investment product or making a recommendation to a customer. To obtain a prospectus, investors should contact their financial advisor. Please read the prospectus carefully before investing.

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.