

Top UIT Investment Strategies

As of 7/31/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

10 Year Composite Performance (7/31/2013 - 7/31/2023)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Capital Appreciation					
Ubiquitous Strategy Portfolio	Advisors Asset Management	375.66%	16.88%	291.31%	14.62%
Technology Portfolio	Guggenheim Funds Distributors	375.36%	16.87%	314.10%	15.27%
Multinational Titans Portfolio	Guggenheim Funds Distributors	228.69%	12.64%	187.11%	11.12%
Health Care Portfolio	Guggenheim Funds Distributors	219.04%	12.30%	176.25%	10.70%
Guggenheim US Capital Strength Portfolio	Guggenheim Funds Distributors	212.46%	12.07%	169.66%	10.43%
Strategic Foundations of Growth Portfolio	Advisors Asset Management	182.05%	10.93%	145.11%	9.38%
Brand Favorites Focus Portfolio	Advisors Asset Management	176.74%	10.72%	140.13%	9.16%
Blue Chip Portfolio	Advisors Asset Management	173.33%	10.58%	135.73%	8.95%
Large Cap Core Strategy	Invesco Capital Markets	167.43%	10.34%	134.73%	8.91%
Angels Portfolio	Advisors Asset Management	166.90%	10.32%	132.07%	8.78%

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

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