

# Top UIT Investment Strategies

As of 7/31/2023

By Investment Strategy Goal

## Investment Category - Domestic Equity

5 Year Composite Performance (7/31/2018 - 7/31/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
<b>Momentum</b>					
Dorsey Wright Relative Strength Top 50	First Trust Portfolios	56.13%	9.32%	48.53%	8.23%
<b>Socially Responsible</b>					
Sustainable Impact Investing Trust	Hennion & Walsh	67.02%	10.80%	56.67%	9.40%
ESG Opportunity Portfolio	Invesco Capital Markets	53.31%	8.92%	45.93%	7.85%
<b>Thematic</b>					
Homebuilders Recovery Select Portfolio	First Trust Portfolios	140.63%	19.20%	128.50%	17.97%
AI, Robotics & Technology Opportunity Portfolio	First Trust Portfolios	111.55%	16.17%	101.01%	14.99%
<b>Building America Strategy Portfolio</b>	<b>Advisors Asset Management</b>	<b>100.89%</b>	<b>14.97%</b>	<b>90.60%</b>	<b>13.77%</b>
Cybersecurity Portfolio	First Trust Portfolios	97.59%	14.59%	86.71%	13.30%
Argus Modern Innovators Trust	Hennion & Walsh	95.19%	14.31%	82.08%	12.73%
Bulldog Portfolio- A CJL LLC Portfolio	Advisors Asset Management	93.74%	14.14%	83.08%	12.86%
Technological Innovation Portfolio	Guggenheim Funds Distributors	92.82%	14.03%	82.17%	12.74%
U.S. Infrastructure Portfolio	First Trust Portfolios	88.74%	13.55%	78.09%	12.23%
Richard Bernstein Advisors Tactical Series, American Industrial Renaissance®	First Trust Portfolios	87.95%	13.45%	78.18%	12.25%
Water Utility & Infrastructure Select Portfolio	First Trust Portfolios	79.92%	12.47%	70.71%	11.29%

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.