

# 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)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
<b>BuyWrite</b>					
Capital Strength Buy-Write Portfolio	First Trust Portfolios	45.13%	7.73%	37.34%	6.55%
S&P Dividend Aristocrats Buy-Write Portfolio	First Trust Portfolios	40.93%	7.10%	29.44%	5.30%
Blue Chip Covered Call Portfolio	Advisors Asset Management	35.15%	6.21%	28.38%	5.12%
<b>Capital Appreciation</b>					
Technology Select Portfolio	First Trust Portfolios	108.89%	15.87%	97.64%	14.60%
Technology Portfolio	Guggenheim Funds Distributors	108.34%	15.81%	96.94%	14.52%
Capital Strength Portfolio	First Trust Portfolios	88.41%	13.51%	78.09%	12.23%
<b>Ubiquitous Strategy Portfolio</b>	<b>Advisors Asset Management</b>	<b>88.39%</b>	<b>13.50%</b>	<b>77.62%</b>	<b>12.18%</b>
Multinational Titans Portfolio	Guggenheim Funds Distributors	88.22%	13.48%	77.69%	12.18%
<b>Ubiquitous Strategy Portfolio - 15 Month</b>	<b>Advisors Asset Management</b>	<b>83.65%</b>	<b>12.93%</b>	<b>72.94%</b>	<b>11.58%</b>
Cyclical Strength Portfolio	First Trust Portfolios	80.62%	12.55%	70.89%	11.31%
Core Holdings Growth Trust	First Trust Portfolios	75.33%	11.89%	70.52%	11.26%
Health Care Select Portfolio	First Trust Portfolios	70.31%	11.24%	61.35%	10.04%
Strategic Foundations of Growth Portfolio	Advisors Asset Management	69.39%	11.12%	61.26%	10.03%

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

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