Innovative investment solutions

Looking for a compelling choice for investing in your future? You may want to consider an established investment option that might be new to you – a unit investment trust, commonly known as a UIT.

What is a UIT?

Like a traditional mutual fund, a UIT holds a basket of securities – such as stocks, bonds or alternative investments – chosen by experienced investment professionals. It offers a simple, convenient way to add exposure to an asset class, market sector or investment strategy to your portfolio.

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For illustrative purposes only

Like mutual funds, UITs offer a wide range of objectives and risk levels to meet your specific investment needs.

Why consider investing in a UIT?

A UIT may offer different benefits and features from a mutual fund, which may make it an attractive complementary investment to core holdings in your portfolio.

Potential benefits

- **A buy-and-hold strategy.** Portfolios generally remain invested in the same set of securities throughout the term of the trust, except in limited circumstances. Having a defined portfolio lets you "know what you own," which can help you avoid concentrated positions and portfolio overlap.
- **Predetermined maturity.** Equity UITs have a defined trust life, which can help provide a more dependable investment time horizon.
- **Market exposure.** UITs generally have limited cash positions, so more of your money is working for you in the market.

Attractive features

- **Low minimum investment level.** Investors may invest in UITs with a low minimum investment.
- **Predetermined income potential.** Some fixed income UITs often have a fairly consistent distribution payment. While income can't be guaranteed, this feature can help you plan the amount of regular income you may receive.
- **Relatively low expenses.** Invesco UITs have competitive fees compared with mutual funds and similar products, and offer rollover discounts when you change from one equity portfolio to another.

Understanding the differences between mutual funds, ETFs, UITs and individual securities

	UITs	Exchange-Traded Funds (ETFs)	Mutual Funds	Individual Securities
Professional selection	■		■	
Monitored portfolio	■	■	■	
Actively managed portfolio			■	
Defined portfolio	■	■		■
Diversification[1]	■	■	■	
Liquidity[2]	■	■	■	■
No ongoing fees[3]				■
Automatic reinvestment options[4]	■		■	

The characteristics described above represent general attributes of typical investments of the types indicated. Specific investments may have different characteristics. Please consult a prospectus. ETFs refer to typical exchange-traded funds structured as open-end funds or unit investment trusts. Mutual Funds refer to typical open-ended funds.

Talk to your financial professional

UITs may be worth exploring to tailor your portfolio to your specific needs and financial goals. Your financial professional can help you decide if UITs may be an appropriate investment to meet your unique financial needs.

Explore High-Conviction Investing with Invesco

1 Diversification does not ensure a profit or eliminate the risk of loss.
2 Investment return and principal value will fluctuate and units, when redeemed, may be worth more or less than what you paid. Individual securities and ETFs may be purchased and sold throughout each business day while mutual fund shares and trust units may be purchased and redeemed based upon prices determined as of the close of business each business day.
3 Wrap-fee and advisory accounts typically impose annual fees.
4 Certain stocks may offer dividend reinvestment plans.

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