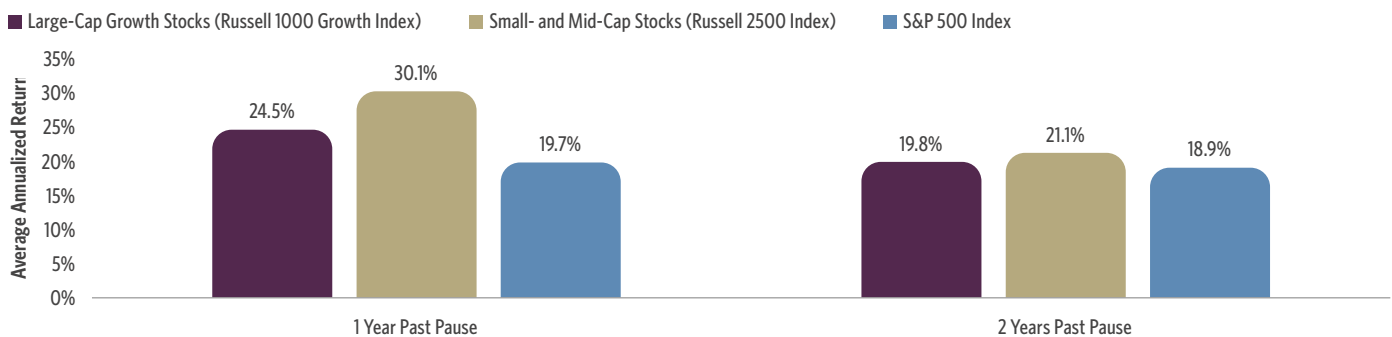


## Equity Opportunities in a Rate Cutting Market

Historically, when the Federal Reserve resumes rate cuts after a pause of at least three months, equities have surged. In the last four easing cycles after a Fed pause, the S&P 500® Index posted average total returns of 19.7 percent and 18.9 percent in the 12 and 24 months following the first cut, respectively.<sup>1</sup> Within the equity market, SMid cap stocks and large-cap quality stocks outperformed the broad market.

### Equity Performance After the Last Four Intra-Easing Cycle Pauses



### Positioning Portfolios for a Rate Cutting Market

Positioning portfolios to emphasize these segments can help investors capitalize on the tailwinds of a rate cutting cycle after a pause. Guggenheim Investments offers two equity UIT strategies positioned to benefit in this environment.

Strategy	Description	Term
<b>SMid Dividend Strength Portfolio</b>	A diversified portfolio of 30 small- and mid-cap equity securities that have at least five years of year-over-year dividend growth.	2-Year
<b>Blue Chip Growth Portfolio</b>	A portfolio of 30 large-cap equity stocks with strong competitive positions, above average growth prospects and consistently high profitability.	2-Year

<sup>1</sup> Source: Bloomberg 8.31.2025.

To learn more about which Guggenheim strategies may be attractive in today's economic environment, contact your financial advisor or visit [GuggenheimInvestments.com](https://www.guggenheiminvestments.com).

The easing cycle time periods used for analysis were: A mid-cycle adjustment lasting from 7.6.1995 until 11.16.1998; the dotcom easing lasting from 1.3.2001 until 6.25.2003; Global Financial Crisis easing lasting from 9.18.2007 to 12.16.2008; and COVID easing lasting from 8.1.2019 to 6.16.2020. The current easing cycle started 9.17.2024. A pausing period is defined as the first instance within a rate cycle where the fed funds rate remained unchanged for more than three consecutive months. The pause periods referenced in this analysis were: 7.06.1995-12.18.1995, 12.11.2001-11.5.2002, 4.30.2008-10.7.2008, and 10.31.2019-3.3.2020. The return periods used in the analysis are forward looking one- and two-year time periods beginning with the first rate cut immediately following the end of each pause period. Returns greater than one year are annualized. Index Definitions: The **S&P 500® Index** is a capitalization-weighted index of 500 stocks. The Index is designed to measure performance of the broad domestic economy through changes in the aggregate market value of 500 stocks representing all major industries. The **Russell 2500 Index** is a small- to mid-cap U.S. stock market index that makes up the smallest 2,500 stocks in the Russell 3000 Index. The **Russell 1000 Growth Index** measures the performance of the large- cap growth segment of the US equity universe. Indexes are unmanaged and it is not possible to invest directly in an index.

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