

Global Balanced Income Builder Portfolio, Series 25

Investment Objective

The Global Balanced Income Builder Portfolio, Series 25 (Trust) seeks current income as the primary objective, with the potential for capital appreciation as a secondary objective.

Key Considerations

- **50/50 Blend:** The portfolio is composed of approximately 50% global dividend-paying equities and approximately 50% ETFs that invest in fixed-income securities with exposure to both developed and emerging market economies, as of the inception date.
- **Balanced Approach to Growth & Income:** The strategy offers investors exposure to high growth areas such as emerging market equities while also providing a high level of income potential through equity dividends and multiple fixed-income sectors.
- **Enhanced Diversification:** The portfolio is strategically balanced, as of date of deposit, between equities and fixed-income ETFs seeking to provide enhanced diversification¹ through low correlation.

¹Diversification neither assures a profit nor eliminates the risk of experiencing investment losses.

Going Global for a Balanced Approach to Growth & Income

For growth and income, a balanced approach with global exposure may be attractive. Balanced investing, which combines equity and fixed-income asset classes, offers the potential to diversify and potentially reduce risk in a portfolio, while a global approach that extends across borders may offer enhanced growth and opportunities over a pure U.S.-focused portfolio.

Guggenheim's Global Balanced Income Builder Portfolio provides access to both global equity and fixed-income securities in one portfolio. The approximately 50% equity allocation of the portfolio is split between dividend-paying U.S. equities and dividend-paying American Depository Receipt (ADR)/Global Depository Receipts (GDR) equity securities, representing both developed and emerging markets. The remaining approximately 50% fixed-income allocation is comprised of fixed-income exchange traded funds (ETFs), investing in both domestic and international fixed-income securities that Guggenheim believes may have the potential for current income. The Portfolio seeks to offer investors upside potential, while minimizing volatility to improve the overall risk/return characteristics of the portfolio.

Portfolio Allocation

Breakdown and weightings are as of 3.28.2025 and subject to change.

FIXED-INCOME SECTOR WEIGHTINGS	
Floating Rate / Senior Loan	8.72%
Corporate High Yield	8.71%
Corporate Investment Grade	7.49%
Mortgage-Backed Securities	6.24%
Inflation Protection	3.75%
International	3.73%
Municipal Build America Bonds	3.73%
Collateralized Loan Obligation	2.50%
International Corporate	2.49%
Agency / Government Guaranteed	1.24%
Preferred	1.24%
TOTAL	49.84%

Sources: Guggenheim, Morningstar.

DOMESTIC/ INTERNATIONAL BREAKDOWN (ENTIRE PORTFOLIO)

Domestic	60.10%
International	39.90%

TOP FIVE COUNTRIES (HEADQUARTERS)*

United States	25.28%
Brazil	4.98%
Great Britain	4.98%
Canada	3.30%
Australia	1.67%

CAPITALIZATION BREAKDOWN*

Large-Cap	43.46%
Mid-Cap	6.70%
TOTAL	50.16%

*The capitalization and country breakdowns exclude ETFs and represent approximately 50.16% of the overall Trust portfolio as of 3.28.2025 and are subject to change. Source: FactSet.

The Global Balanced Income Builder Portfolio, Series 25 is a Unit Investment Trust.

RISK CONSIDERATIONS: As with all investments, you may lose some or all of your investment in the Trust. No assurance can be given that the Trust's investment objective will be achieved. The Trust also might not perform as well as you expect. This can happen for reasons such as these: • Securities prices can be volatile. The value of your investment may fall over time. Market values of the Trust's securities fluctuate in response to various factors affecting an issuer. Events such as war, terrorism, natural and environmental disasters and public health emergencies are impossible to predict and may adversely affect the economy which may negatively impact the performance of the Trust and the Trust's ability to achieve its investment objectives. • The Trust invests in dividend-paying securities, which could cause the Trust to underperform similar funds that invest without consideration of a company's track record of paying dividends. Securities of companies with a history of paying dividends may not participate in a broad market advance to the same degree as most other securities, and a sharp rise in interest rates or economic downturn could cause a company to unexpectedly reduce or eliminate its dividend. • The Trust invests in shares of ETFs that are subject to various risks, including management fee. Unitholders of the Trust will bear these fees in addition to the fees and expenses of the Trust. • The Trust is subject to an ETF's index correlation risk. • The value of the fixed-income securities in the ETFs will generally fall if interest rates, in general, rise. • An ETF or an issuer of securities held by an ETF may be unwilling or unable to make principal payments and/or to declare distributions in the future, may call a security before its stated maturity, may reduce the level of distributions declared,

or may suspend dividends. This may result in a reduction in the value of your units. • The financial condition of an ETF or an issuer of securities held by an ETF may worsen, resulting in a reduction in the value of your units. • Economic conditions may lead to limited liquidity and greater volatility. • Certain ETFs held by the Trust invest in securities that are rated below investment-grade ("junk" bonds) by one or more rating agencies; these are speculative and subject to greater market and credit risks, and the risk of nonpayment or default is higher. • The Trust and certain ETFs held by the Trust invest in: — U.S.-listed foreign securities, ADRs, and foreign securities, which will be more volatile than U.S. securities due to such factors as adverse economic, currency, political, social or regulatory developments in a country; — Securities issued by companies headquartered or incorporated in countries considered to be emerging markets, which may be exposed to greater volatility and market risk such as, investment and trading limitations, liquidity concerns, political uncertainties and dependence on international trade and development assistance. — Securities whose value may be dependent on currency exchange rates, which can fluctuate widely due to various economic and political reasons. — Securities issued by small- and mid-cap companies which involve more investment risk due to limited product lines, markets or financial resources and may be more vulnerable to adverse general market or economic developments. • The Trust may be susceptible to potential risks through breaches in cybersecurity. • The Trust is subject to risks arising from various operational factors and their service providers. Although the Trust seeks to reduce operational risks through controls and procedures, there is no way to completely protect against such risks. **Please see the Trust prospectus for more complete risk information.**

Unit Investment Trusts are fixed, not actively managed and should be considered as part of a long-term strategy. Investors should consider their ability to invest in successive portfolios, if available, at the applicable sales charge. UITs are subject to annual fund operating expenses in addition to the sales charge. Investors should consult an attorney or tax advisor regarding tax consequences associated with an investment from one series to the next, if available, and with the purchase or sale of units. Guggenheim Funds Distributors, LLC does not offer tax advice.

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Read the Trust's prospectus carefully before investing. It contains the Trust's investment objectives, risks, charges, expenses and other information, which should be considered carefully before investing. Obtain a prospectus at GuggenheimInvestments.com.

Guggenheim Funds Distributors, LLC

Member FINRA/SIPC

03/2025 UIT-FCT-GBAL-025 #64448

Global Balanced Income Builder Portfolio, Series 25

PORTFOLIO SUMMARY

Inception Date	3.31.2025
Termination Date	3.31.2027
Initial Offer Price	\$10.00
Number of Issues	79
Historical Annual Dividend Distribution²	\$0.4451
Distributions	25th day of each month commencing on 4.25.2025, if any

TICKETING INFORMATION - CUSIPS

Cash	40178H146
Reinvest	40178H153
Fee/Cash	40178H161
Fee/Reinvest	40178H179
Ticker	CGBLZX

SALES CHARGES AND ESTIMATED EXPENSES

The sales charges (S/C) and estimated expenses are based on a \$10 per unit offering price.

	Standard	Fee/Wrap ³
Deferred S/C ⁴	2.25%	-
Creation and Development (C&D) Fee	0.50%	0.50%
Total S/C	2.75%	0.50%
Estimated Organization Expenses ⁵	0.31%	0.31%
Estimated Annual Fund Operating Expenses ⁶	0.37%	0.37%

²The Historical Annual Dividend Distribution (HADD) is as of the day prior to trust deposit and subject to change. There is no guarantee the issuers of the securities included in the Trust will declare dividends or distributions in the future. The HADD of the securities included in the Trust is for illustrative purposes only and is not indicative of the Trust's distribution rate. The HADD is the weighted average of the trailing twelve-month distributions paid by the securities included in the portfolio and is reduced to account for the effects of fees and expenses, which will be incurred when investing in the Trust. The HADD will vary due to certain factors that may include, but are not limited to, a change in the dividends paid by issuers, a change in Trust expenses or the sale or maturity of securities in the portfolio. ³Fee/Wrap-based accounts will not be assessed the deferred sales charge for eligible purchases and must purchase units with a Fee-based CUSIP. For unit prices other than \$10, percentage of the C&D fee will vary. ⁴The deferred sales charge (DSC) is a fixed amount and will be deducted in monthly installments on the last business day commencing October 2025 and ending December 2025 or upon early redemption. For unit prices other than \$10, percentages of C&D fees, and DSCs will vary but in no event will the maximum sales charge (S/C) exceed the total S/C. Early redemption of units will still cause payment of the DSC. However, an initial sales charge, which is equal to the difference between the maximum S/C and the sum of any remaining deferred S/C charges and C&D, will be charged if the price paid for units exceeds \$10 per unit. ⁵Estimated Organization Expenses are assessed on a fixed dollar amount per unit basis, therefore, actual organization costs may be more or less than estimates. For additional information on organizational costs and potential caps, please see the prospectus. ⁶Trust operating expenses include fees for administration, bookkeeping, the trustee, sponsor, and evaluator. This expense also includes an estimated Trust operating expense based upon an estimated trust size. If the Trust does not reach or falls below the estimated size, the actual amount of the operating expenses may exceed the amount reflected. Please see "Fees and Expenses" in the Trusts prospectus for additional information.

PORTFOLIO HOLDINGS

Holdings, breakdown, and weightings are as of 3.28.2025 and subject to change.

Symbol	Company Name
Common Stocks (48.49%)	
Communication Services (4.15%)	
BCE	BCE, Inc.
TEF	Telefonica SA
TU	TELUS Corporation
TIMB	TIM SA/Brazil
VOD	Vodafone Group PLC
Consumer Discretionary (2.55%)	
HD	Home Depot, Inc.
MCD	McDonald's Corporation
STLA	Stellantis NV
Consumer Staples (4.20%)	
BTI	British American Tobacco PLC
KOF	Coca-Cola Femsa SAB de CV
PEP	PepsiCo, Inc.
SYY	Sysco Corporation
WMT	Walmart, Inc.
Energy (6.67%)	
CVX	Chevron Corporation
EC	Ecopetrol SA
ENB	Enbridge, Inc.
E	Eni SpA
EQNR	Equinor ASA
PBR	Petroleo Brasileiro SA
TRP	TC Energy Corporation
WDS	Woodside Energy Group, Limited
Financials (10.74%)	
BBD	Banco Bradesco SA
BCH	Banco de Chile
CIB	Bancolombia SA
BLK	Blackrock, Inc.
GS	Goldman Sachs Group, Inc.
HSBC	HSBC Holdings PLC
ING	ING Groep NV
ICE	Intercontinental Exchange, Inc.
JPM	JPMorgan Chase & Company
MMC	Marsh & McLennan Companies, Inc.
NWG	NatWest Group PLC
V	Visa, Inc.
WF	Woori Financial Group, Inc.
Health Care (2.57%)	
AMGN	Amgen, Inc.
JNJ	Johnson & Johnson
MRK	Merck & Company, Inc.
Industrials (5.02%)	
ADP	Automatic Data Processing, Inc.
CMI	Cummins, Inc.
PAC	Grupo Aeroportuario del Pacifico SAB de CV
NOC	Northrop Grumman Corporation
UNP	Union Pacific Corporation
WM	Waste Management, Inc.

Symbol	Company Name
Information Technology (3.37%)	
ASX	ASE Technology Holding Company, Limited
CSCO	Cisco Systems, Inc.
MSFT	Microsoft Corporation
QCOM	QUALCOMM, Inc.
Materials (5.04%)	
BHP	BHP Group, Limited
EMN	Eastman Chemical Company
GGB	Gerda SA
LIN	Linde PLC
RIO	Rio Tinto PLC
VALE	Vale SA
Utilities (4.18%)	
CIG	Cia Energetica de Minas Gerais
DUK	Duke Energy Corporation
NGG	National Grid PLC
NEE	NextEra Energy, Inc.
XEL	Xcel Energy, Inc.
Exchange Traded Funds (49.84%)	
PICB	Invesco International Corporate Bond ETF
BKLN	Invesco Senior Loan ETF
BAB	Invesco Taxable Municipal Bond ETF
QLTA	iShares Aaa - A Rated Corporate Bond ETF
AGZ	iShares Agency Bond ETF
USHY	iShares Broad USD High Yield Corporate Bond ETF
CMBS	iShares CMBS ETF
FLOT	iShares Floating Rate Bond ETF
CEMB	iShares J.P. Morgan EM Corporate Bond ETF
EMB	iShares J.P. Morgan USD Emerging Markets Bond ETF
PFF	iShares Preferred and Income Securities ETF
TIP	iShares TIPS Bond ETF
JAAA	Janus Henderson AAA CLO ETF
JMBS	Janus Henderson Mortgage-Backed Securities ETF
SJNK	SPDR Bloomberg Short Term High Yield Bond ETF
WIP	SPDR FTSE International Government Inflation-Protected Bond ETF
ANGL	VanEck Fallen Angel High Yield Bond ETF
EMLC	VanEck J. P. Morgan EM Local Currency Bond ETF
VCLT	Vanguard Long-Term Corporate Bond ETF
Real Estate Investment Trusts (1.67%)	
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PLD	Prologis, Inc.
REG	Regency Centers Corporation