



CLIENT RESOURCE KIT

ELECTION

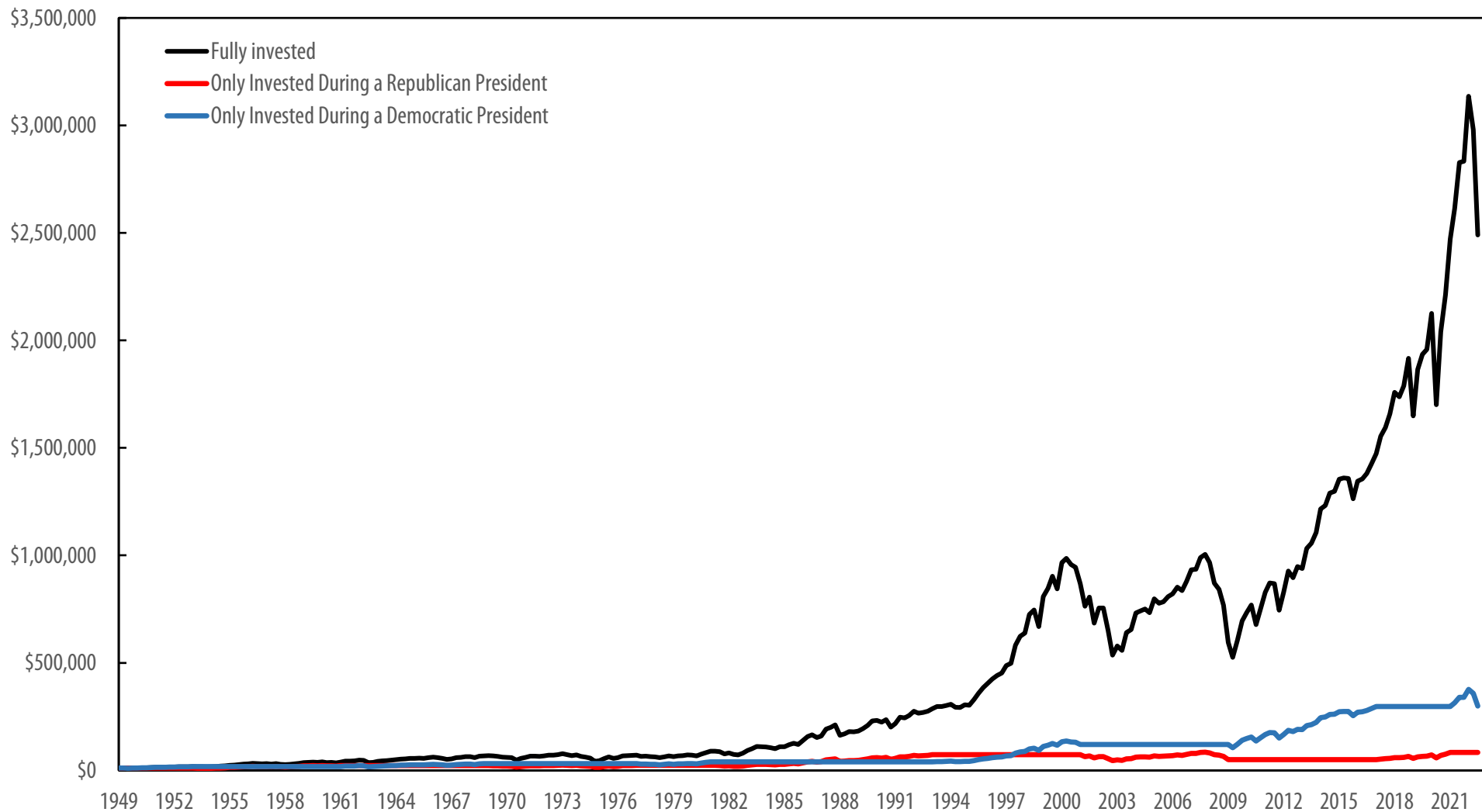
 First Trust

Year	President	S&P 500 Annual Total Returns	% Change in Real GDP
1950	Harry S. Truman	31.71%	8.7%
1951	Harry S. Truman	24.02%	8.0%
1952	Harry S. Truman	18.37%	4.1%
1961	John F. Kennedy	26.89%	2.6%
1962	John F. Kennedy	-8.73%	6.1%
1963	John F. Kennedy/Lyndon B. Johnson	22.80%	4.4%
1964	Lyndon B. Johnson	16.48%	5.8%
1965	Lyndon B. Johnson	12.45%	6.5%
1966	Lyndon B. Johnson	-10.06%	6.6%
1967	Lyndon B. Johnson	23.98%	2.7%
1968	Lyndon B. Johnson	11.06%	4.9%
1977	Jimmy Carter	-7.18%	4.6%
1978	Jimmy Carter	6.56%	5.5%
1979	Jimmy Carter	18.44%	3.2%
1980	Jimmy Carter	32.42%	-0.3%
1993	Bill Clinton	9.99%	2.8%
1994	Bill Clinton	1.31%	4.0%
2009	Barack Obama	26.46%	-2.5%
2010	Barack Obama	15.06%	2.6%
	AVERAGE	14.32%	4.2%

Source: Morningstar, Bureau of Economic Analysis. **Past performance is no guarantee of future results.** For illustrative purposes only and not indicative of any actual investment. The S&P 500 Index is an unmanaged index of 500 companies used to measure large-cap U.S. stock market performance. Indexes do not charge management fees and no such fees or expenses were deducted from the performance shown. Investors cannot invest directly in an index. Real gross domestic product (GDP) is an inflation-adjusted measure that reflects the value of all goods and services produced by an economy in a given year.

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GROWTH OF \$10,000 IN THE S&P 500 INDEX SINCE 1949

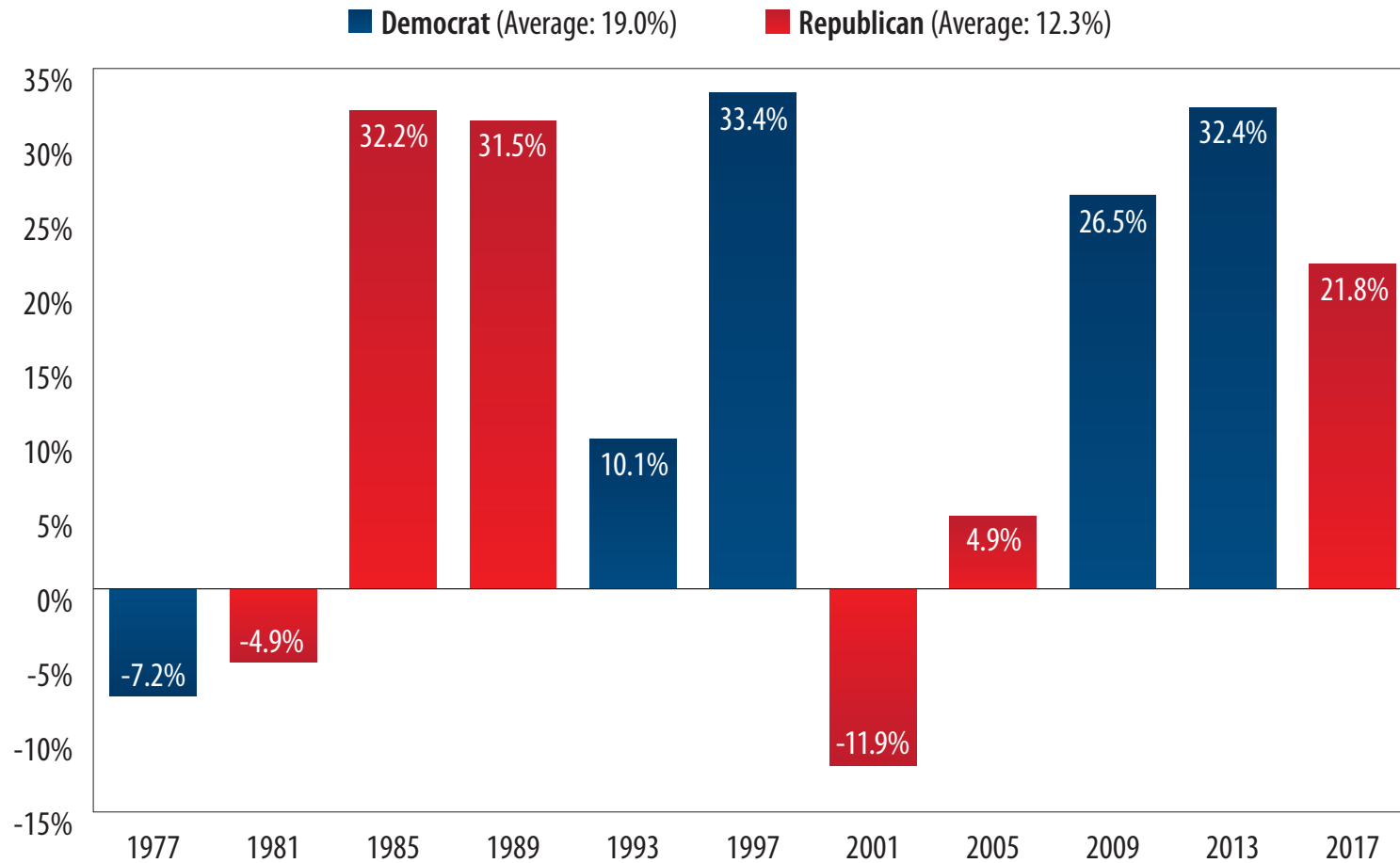


Source: Standard & Poor's, FT Advisors. Data is quarterly from 1949 – 2Q 2022.

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S&P 500 Index Total Returns: First Year Of A Four-Year Presidential Term



Source: Morningstar/Ibbotson Associates. **Past performance is no guarantee of future results.** Data shows first year returns of the last 11 presidential terms. This chart is for illustrative purposes only and not indicative of any actual investment. The illustration excludes the effects of taxes and brokerage commissions and other expenses incurred when investing. Investors cannot invest directly in an index. The S&P 500 Index is an unmanaged index of 500 companies used to measure large-cap U.S. stock market performance.

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How Stocks Have Fared In The First Year Of A Four-Year Presidential Term

S&P 500 Index & Sector Index Total Returns

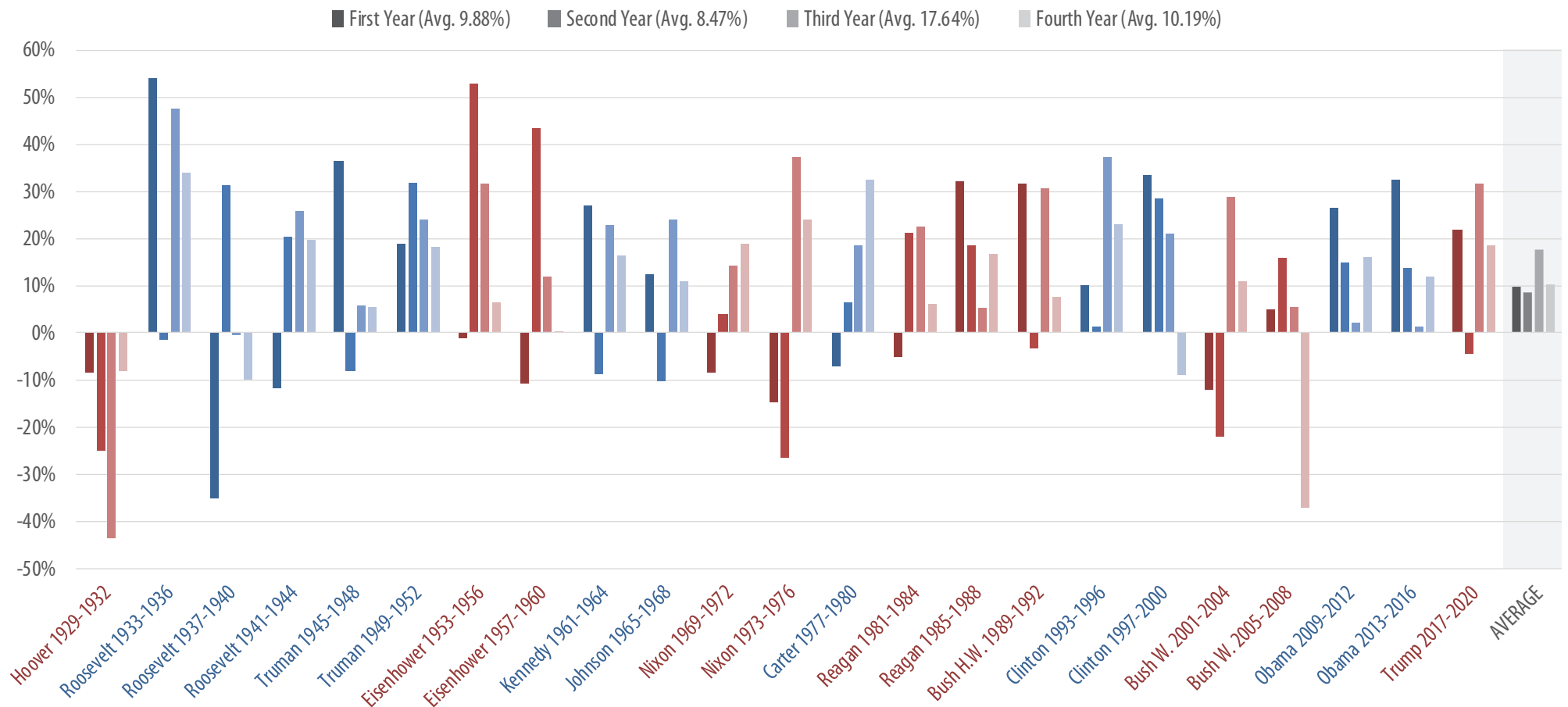
	1993	1997	2001	2005	2009	2013	2017
White House	Democrat	Democrat	Republican	Republican	Democrat	Democrat	Republican
Senate	Democrat	Republican	Democrat	Republican	Democrat	Democrat	Republican
House of Representatives	Democrat	Republican	Republican	Republican	Democrat	Republican	Republican
S&P 500 Index	10.08%	33.36%	-11.89%	4.91%	26.46%	32.39%	21.83%
Communication Services	15.06%	41.24%	-12.24%	-5.63%	8.93%	11.47%	-1.25%
Consumer Discretionary	14.64%	34.36%	2.79%	-6.37%	41.31%	43.08%	22.98%
Consumer Staples	-3.86%	32.89%	-6.40%	3.58%	14.89%	26.14%	13.49%
Energy	15.88%	25.28%	-10.39%	31.37%	13.82%	25.07%	-1.01%
Financials	10.60%	48.15%	-8.95%	6.48%	17.22%	35.63%	22.18%
Health Care	-8.18%	43.73%	-11.96%	6.46%	19.70%	41.46%	22.08%
Industrials	21.71%	28.53%	-25.87%	0.99%	61.72%	28.43%	38.83%
Information Technology	18.58%	27.04%	-5.74%	2.32%	20.93%	40.68%	21.03%
Materials	13.46%	8.41%	3.48%	4.42%	48.59%	25.60%	23.84%
Real Estate	N/A	N/A	N/A	12.56%	27.10%	1.60%	10.85%
Utilities	13.69%	24.65%	-30.45%	16.84%	11.91%	13.21%	12.11%

Source: Bloomberg and The Spokesman-Review. **Past performance is no guarantee of future results.** This chart is for illustrative purposes only and not indicative of any actual investment. The illustration excludes the effects of taxes and brokerage commissions or other expenses incurred when investing. Investors cannot invest directly in an index. The S&P 500 Index is an unmanaged index of 500 companies used to measure large-cap U.S. stock market performance. The 11 major S&P 500 Sector Indices are capitalization-weighted and comprised of S&P 500 constituents representing a specific sector.

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S&P 500 Index Performance: 4-Year Election Cycle

On and around election day there is often some anxiety about how a president's 4-year term might impact the stock market. Below we look at S&P 500 Index performance by year of each election cycle. Over the past 92 years, the S&P 500 Index has seen positive performance 73% of the time, and has averaged a yearly total return of 11.54%. Seeing the big picture can help us to stay focused on our long-term investment goals.



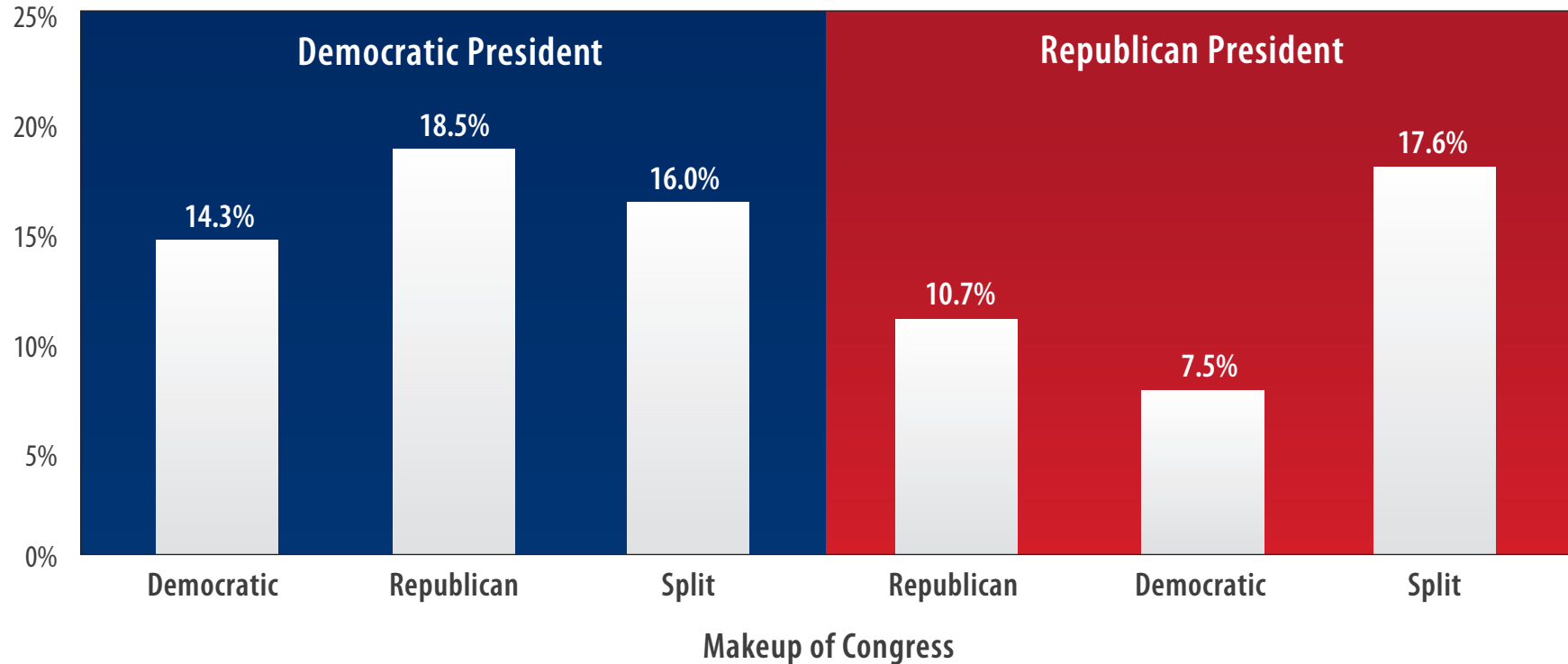
Observations

- 67 of the 92 years (73%) provided positive performance
- The average total return for a 4-year term was 46.18%
- When a Republican was in office the average yearly total return was 7.85%
- When a Democrat was in office the average yearly total return was 14.93%

Source: Morningstar/Ibbotson Associates. **Past performance is no guarantee of future results.** For illustrative purposes only and not indicative of any actual investment. The S&P 500 Index is an unmanaged index of 500 companies used to measure large-cap U.S. stock market performance. Investors cannot invest directly in an index. Index returns do not reflect any fees, expenses, or sales charges. These returns were the result of certain market factors and events which may not be repeated in the future.

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Average S&P 500 Index Total Return Annual Performance 1950-2020



Source: Morningstar, Bloomberg. **Past performance is no guarantee of future results.** This chart is for illustrative purposes only and not indicative of any actual investment. These returns were the result of certain market factors and events which may not be repeated in the future. The S&P 500 Index is an unmanaged index of 500 companies used to measure large-cap U.S. stock market performance. Indices do not charge management fees or brokerage expenses, and no such fees or expenses were deducted from the performance shown. Investors cannot invest directly in an index.

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