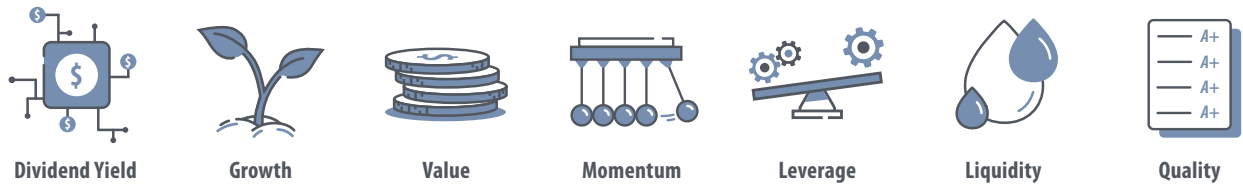


The First Trust Direct Indexing platform provides a menu of 70 personalization screens to help identify, customize, and align your portfolio with your convictions. The following broad pre-configurations align with specific portfolio positions, affinity groups, and/or values-based investing preferences.

Quantitative Factors



Dividend Yield

Growth

Value

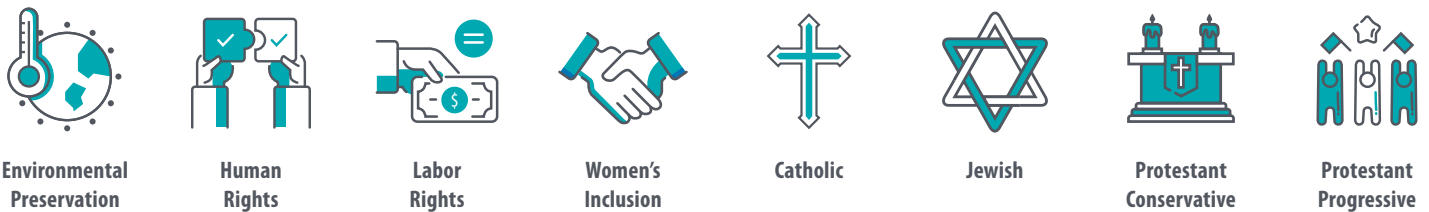
Momentum

Leverage

Liquidity

Quality

Qualitative Screens



Environmental Preservation

Human Rights

Labor Rights

Women's Inclusion

Catholic

Jewish

Protestant Conservative

Protestant Progressive

Board Governance Preferences



ESG Scoring

Diversity and Inclusion Initiatives

Corporate Responsibility Track Record

You could lose money by investing in a direct indexing strategy. There can be no assurance that a strategy will achieve its investment objectives.

Broader Exclusions include the worst offending companies represented by the curated exclusions as well as a broader group of companies with high involvement in the issue.

The information presented is not intended to constitute an investment recommendation for, or advice to, any specific person. By providing this information, First Trust is not undertaking to give advice in any fiduciary capacity within the meaning of ERISA, the Internal Revenue Code or any other regulatory framework. Financial professionals are responsible for evaluating investment risks independently and for exercising independent judgment in determining whether investments are appropriate for their clients.

First Trust Direct Indexing L.P. ("FT Direct Indexing") is an investment advisor registered with the U.S. Securities and Exchange Commission. FT Direct Indexing is affiliated with First Trust Portfolios L.P. and is responsible for the day-to-day management of direct index SMAs. First Trust Portfolios L.P. is the marketing agent for the direct index SMAs.

FT Direct Indexing has entered into a contractual agreement with an affiliate, First Trust Portfolios L.P. and First Trust Advisors L.P. (jointly referred to as "First Trust"), to solicit investment advisory services provided by FT Direct Indexing. Since FT Direct Indexing management fees are based upon a percentage of assets under management, the more assets under management, the higher the fee income to FT Direct Indexing. In addition, since First Trust's affiliate, First Trust Capital Partners LLC, owns FT Direct Indexing, First Trust will indirectly benefit from an increase in fees received by FT Direct Indexing. Due to such compensation, First Trust has an incentive to recommend advisory services of FT Direct Indexing, resulting in a material conflict of interest which should be considered when making a decision to engage FT Direct Indexing. First Trust will not be involved in the provision of services by FT Direct Indexing.