

# SUN LIFE GLOBAL INVESTMENTS

BRINGS YOU



An aerial photograph of a city, likely New York City, featuring a prominent domed building in the foreground. The image is overlaid with a dark orange filter. The text is positioned in the upper left quadrant, enclosed in a white vertical line on its left side.

**In 1924**, MFS created the first U.S. open-end mutual fund, giving everyday people the opportunity to invest their savings using a professionally managed and cost-effective investment solution.



**MFS was founded in 1924.** Since then, the company has guided investors through every market condition on record. From humble beginnings in Boston to what's now a global footprint that stretches from São Paulo, Brazil to Sydney, Australia, MFS has spent nearly a century honing its collaborative investment process to build better insights for clients.

## The power of conviction

MFS has the investment experience that can only come with a long and rich history of money management. Through all these years, MFS has been leveraging what it considers to be its greatest strengths and the most important contributors to long-term returns: in-depth research and security selection.

For proof that MFS has been picking stocks with an eye to the future since first opening its doors, consider this: In 1924, portfolio managers purchased shares in two of the biggest companies of the day—Standard Oil of New Jersey (now Exxon Mobil), and American Telephone and Telegraph. Those two names were in the MFS portfolio for roughly 90 years.

Nothing says conviction quite like “buy and hold.”

## The value of experience

It's fair to say MFS has seen it all.

MFS not only survived the Great Depression, it provided investors with rocksteady income during one of the most severe financial and social crises in history. Between the years 1929 and 1940, through a total collapse and partial recovery of stock prices, MFS never missed a dividend.

But MFS' strengths are about much more than its early successes and they extend far further than its U.S. origins.

# Investment and Relationship Management **worldwide**

MFS has offices in nine countries, responsible for everything from research to operations. Intelligence gathered through deep-rooted global networks established over decades is put to work for investors.



As of September 30, 2020, MFS managed more than US\$548 billion  
**on behalf of investors everywhere.**

# MFS has built its investment process on three core elements

MFS has built its investment process on three core elements: integrated research, global collaboration, and active risk management. The force that binds these elements together is people. MFS has found that ultimately, collaboration among its people can lead to better results for investors.



## **Integrated research**

Investment professionals work out of nine global financial hubs. Members analyze opportunities across geographies, across industries, and across the entire capital structure of each potential investment to get the big picture. Every effort is made to balance risk and reward before a decision is taken.



## **Global collaboration**

Being on the ground all over the world helps analysts understand the customs and traditions that affect regional markets. This special insight helps put investors at the front of the line for under-the-radar opportunities. MFS believes its global collaborative environment is one of its key competitive advantages.



## **Active risk management**

Every member of the investment team is responsible for ongoing risk assessment. The goal is to provide investors with the greatest possible return within the risk guidelines of each portfolio. Because it's not possible to eliminate risk entirely, MFS employs a rigorous process to manage it every step of the way.

An investment process **by the people, for the people.**

For more about how Sun Life MFS funds can complement your financial plan,  
**speak to your financial advisor today.**

## Look to the future

Every day, MFS explores more global opportunities and digs deeper into regional markets. And every day, that work supports Sun Life Global Investments and our mission to bring Canadian investors some of the best in asset management and innovative solutions from around the world.

Sun Life Global Investments offers Canadians a diverse lineup of mutual funds and innovative portfolio solutions, empowering them to pursue their financial goals at every life stage. We bring together the strength of one of Canada's most trusted names in financial services with some of the best asset managers from around the world to deliver a truly global investment platform. Sun Life Global Investments manages more than \$46 billion\* on behalf of institutional and retail investors from coast to coast and is a member of the Sun Life group of companies.

\*Data current as of September 30, 2020.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. Investors should consult with professional advisors before acting on any information contained in this brochure.

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