

MFS INVESTMENT MANAGEMENT

BROUGHT TO CANADIAN INVESTORS
BY SUN LIFE GLOBAL INVESTMENTS



An aerial photograph of a city, likely New York City, with a prominent domed building in the foreground. The image is overlaid with a semi-transparent orange filter. The text is positioned in the upper left quadrant, with a vertical line to its left.

In 1924, MFS Investment Management 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.

Fast forward to today. Sun Life Global Investments brings that same investment expertise to Canadian investors through our exclusive line-up of **Sun Life MFS funds.**



For over a century, MFS Investment Management has helped to guide U.S. investors through every market cycle – through recessions, wars, and a pandemic.

From humble beginnings in Boston to what's now a global footprint, they have stayed true to a single purpose: to create value for clients by allocating capital responsibly.

The power of conviction

The company has the investment experience that comes with a long and rich history of money management. Over the years, MFS Investment Management has continued to leverage what they consider their greatest strength and the most important contributors to long-term returns: **in-depth research and security selection.**

Since the beginning, the company has been applying their research and investment discipline to invest client capital with an eye to the future. In 1924, portfolio managers purchased shares in two of the biggest companies of the day—Standard Oil of New Jersey (now Exxon Mobil), and AT&T. The MFS portfolio held those two names for roughly 90 years.

Nothing says conviction quite like long-term investing.

The value of experience

MFS Investment Management has a deep-rooted history – and the investment management experience that comes with it.

Not only did the company survive the Great Depression intact, but they also provided U.S. investors with steady and reliable income during one of the most severe financial and social crises in history. Between 1929 and 1940, through a total collapse and partial recovery of stock prices, they never missed a dividend payout.

But beyond the company's early successes, their strengths also extend far further than their U.S. origins.

Investment and Relationship Management **worldwide**

MFS Investment Management has investment offices in nine countries, responsible for everything from research to operations. Market research and insight is gathered through these global networks and put to work for investors.



As of December 31, 2024, MFS Investment Management
managed more than CAD\$872 billion*
on behalf of investors everywhere.

MFS has built its investment process on three core elements

Collective expertise, long-term discipline, and **active risk management** to uncover what their investment management team believes are the best opportunities in the market.



Collective expertise

Combines diverse viewpoints within a shared value system to make what they believe to be the best investment decisions for clients.



Long-term discipline

A cornerstone of their heritage, both in how they invest and run their business. They believe a long-term view is the best way to pursue the outcomes clients need.



Active risk management

Critical to maintaining clients' confidence in their investment management. They navigate risk on the client's behalf by trying to see the company from all angles to understand what they believe is most important.

These elements work together to create an investment process designed to **help clients achieve their long-term financial goals.**

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 Investment Management 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, portfolio solutions and guaranteed investments, 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. For more information, please visit sunlifeglobalinvestments.com.

*Data as of December 31, 2024.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the fund's prospectus. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

MFS Investment Management Canada Limited is the sub-advisor to the Sun Life MFS Funds; SLGI Asset Management Inc. is the registered portfolio manager. MFS Investment Management Canada Limited has appointed MFS Institutional Advisors, Inc. to provide additional sub-advisory services.

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SLGI Asset Management Inc. is the investment manager of the Sun Life family of mutual funds.

Sun Life Assurance Company of Canada is the issuer of accumulation annuities (insurance GICs), payout annuities and individual variable annuity contracts (segregated fund contracts). Any amount that is allocated to a segregated fund is invested at the risk of the contract owner and may increase or decrease in value. Sun Life Financial Trust Inc. is the issuer of guaranteed investment certificates.

Sun Life Global Investments is a trade name of SLGI Asset Management Inc., Sun Life Assurance Company of Canada and Sun Life Financial Trust Inc. all of which are members of the Sun Life group of companies.

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