

FEATURED FUNDS

Sun Life MFS Funds

INTEGRATED RESEARCH | ACTIVE RISK MANAGEMENT | GLOBAL COLLABORATION

Fund name (Series F)	MORNINGSTAR OVERALL RATING™	SINCE INCEPTION Return %	10 YEAR Return %	5 YEAR Return %	3 YEAR Return %	1 YEAR Return %	INCEPTION DATE
GLOBAL NEUTRAL BALANCED							
Sun Life MFS Global Total Return	★★★★	6,9	6,2	4,2	3,3	9,8	2010-09-30
U.S. EQUITY							
Sun Life MFS U.S. Growth	★★★★	15,0	14,8	9,6	3,1	22,6	2010-09-30
Sun Life MFS U.S. Equity	★★★★	9,6	12,5	8,7	8,0	13,5	2008-02-15
INTERNATIONAL EQUITY							
Sun Life MFS International Value	★★★★	9,2	8,1	3,6	-1,0	17,2	2010-10-01
Sun Life MFS International Opportunities	★★★★	7,7	7,6	4,7	2,4	16,0	2010-09-30
GLOBAL EQUITY							
Sun Life MFS Global Growth	★★★★★	11,9	11,9	9,2	5,7	17,9	2010-09-30
Sun Life MFS Global Value	★★★★	11,0	10,0	7,3	8,6	17,5	2010-10-01

Source: Morningstar Direct. Returns for periods longer than 1 year are annualized. Data as of September 30, 2023.

sunlifeglobalinvestments.com/mfs

Series F units are available to investors who have a fee-based account with their dealer and whose dealer has signed an agreement with us.

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. The indicated rates of return are the historical annual compounded total returns including changes in security value and reinvestment of all distributions and do not take into account sales, redemption, distribution or other optional charges or income taxes payable by any security holder that would have reduced returns.

Morningstar Ratings reflect performance as of September 30, 2023, and are subject to change monthly. Morningstar Rating shown is for Series F only; other series may have different performance characteristics.

The ratings are calculated from a fund's 3, 5, and 10-year returns measured against 91-day Treasury bill and peer group returns. The top 10% of the funds in a category get five stars. The Overall Rating is a weighted combination of the 3, 5 and 10-year ratings. For greater detail see www.morningstar.ca.

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Fund name	Category	Morningstar 3-year rating	# Funds in category	Morningstar 5-year rating	# Funds in category	Morningstar 10-year rating	# Funds in category
Sun Life MFS Global Total Return	Global neutral balanced	★★★★	1 315	★★★★	1 124	★★★★	575
Sun Life MFS U.S. Growth	U.S. equity	★	1 213	★★★★	997	★★★★★	503
Sun Life MFS U.S. Equity	U.S. equity	★★★	1 213	★★★★	997	★★★★	503
Sun Life MFS International Value	International equity	★	591	★★★	491	★★★★★	248
Sun Life MFS International Opportunities	International equity	★★★	591	★★★★	491	★★★★★	248
Sun Life MFS Global Growth	Global equity	★★★	1 600	★★★★★	1 371	★★★★★	639
Sun Life MFS Global Value	Global equity	★★★★	1 600	★★★★	1 371	★★★★	639

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. SLGI Asset Management Inc. is the investment manager of the Sun Life Mutual Funds, Sun Life Granite Managed Solutions and Sun Life Private Investment Pools.

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