

Sun Life MFS Funds

INTEGRATED RESEARCH | ACTIVE RISK MANAGEMENT | GLOBAL COLLABORATION

Fund name (Series F)	MORNINGSTAR OVERALL RATING™	SINCE INCEPTION <i>Return %</i>	10 YEAR <i>Return %</i>	5 YEAR <i>Return %</i>	3 YEAR <i>Return %</i>	1 YEAR <i>Return %</i>	YTD <i>Return %</i>	INCEPTION DATE
Canadian Equity								
Sun Life MFS Canadian Equity F	★★★★★	6.5	8.8	9.8	6.4	19.7	19.7	2008-02-15
US Equity								
Sun Life MFS U.S. Growth F	★★★★★	17.3	16.7	16.6	11.5	43.6	43.6	2010-09-30
Sun Life MFS U.S. Equity F	★★★★★	11.1	12.9	13.2	10.1	29.7	29.7	2008-02-15
Sun Life MFS U.S. Value F	★★★	12.4	10.0	9.5	8.0	21.0	21.0	2010-09-30
Sun Life MFS U.S. Mid Cap Growth F	★	3.3	—	—	3.7	24.2	24.2	2021-11-15
International Equity								
Sun Life MFS Low Vol Intl Equity F	★★★★	5.8	—	5.7	6.4	15.4	15.4	2016-02-11
Sun Life MFS Intl Opportunities F	★★★★★	8.8	9.5	7.5	5.8	18.2	18.2	2010-09-30
Sun Life MFS International Value F	★★★★★	10.0	8.6	6.0	1.9	16.0	16.0	2010-10-01
Global Equity								
Sun Life MFS Low Vol Global Equity F	★★★★★	9.4	—	9.6	9.7	22.1	22.1	2016-02-11
Sun Life MFS Global Value F	★★★★★	11.8	10.0	9.5	8.0	16.9	16.9	2010-10-01
Sun Life MFS Global Growth F	★★★★★	12.9	12.5	11.0	6.9	20.3	20.3	2010-09-30
Global Neutral Balanced								
Sun Life MFS Global Total Return F	★★★★★	7.5	6.2	5.6	4.5	11.1	11.1	2010-09-30
Sun Life MFS Diversified Income Fund F	—	7.2	6.7	8.0	7.5	13.6	13.6	2008-02-15
Canadian Fixed Income								
Sun Life MFS Canadian Bond F	★★★	2.3	1.8	0.9	-0.6	4.9	4.9	2012-03-30

Data as of December 31, 2024.

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.

Series A units are available for purchase to all investors, while Series F units are only available to investors who participate in eligible fee-based or wrap programs with their registered dealers. Differences in performance between these series are primarily due to differences in management fees and fixed administration fees. Performance results for Series F units may also appear higher than for Series A units as the management fee does not include the trailing commission. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. The indicated rates of return are the historical annual compounded total returns including changes in units value and reinvestment of all distributions and do not take into account sales, redemption, distribution or optional charges or income taxes payable by any securityholder that would have reduced returns. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

Morningstar Ratings reflect performance as of {asofdate} and are subject to change monthly. The Morningstar Rating shown is for series F; 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.

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 Canadian Equity F	Canadian Equity	★★	553	★★★	469	★★★★★	319
Sun Life MFS U.S. Growth F	US Equity	★★★	1,001	★★★★	876	★★★★★	550
Sun Life MFS U.S. Equity F	US Equity	★★★	1,001	★★★	876	★★★★	550
Sun Life MFS U.S. Value F	US Equity	★★★	1,001	★★	876	★★	550
Sun Life MFS U.S. Mid Cap Growth F	US Equity	★	1,001	—	876	—	550
Sun Life MFS Low Vol Intl Equity F	International Equity	★★★★	588	★★★	542	—	297
Sun Life MFS Intl Opportunities F	International Equity	★★★	588	★★★★	542	★★★★★	297
Sun Life MFS International Value F	International Equity	★★	588	★★★	542	★★★★★	297
Sun Life MFS Low Vol Global Equity F	Global Equity	★★★★★	1,530	★★★★	1,282	—	648
Sun Life MFS Global Value F	Global Equity	★★★★	1,530	★★★	1,282	★★★★	648
Sun Life MFS Global Growth F	Global Equity	★★★	1,530	★★★★	1,282	★★★★★	648
Sun Life MFS Global Total Return F	Global Neutral Balanced	★★★★	1,430	★★★	1,210	★★★★	706
Sun Life MFS Diversified Income Fund F	Global Neutral Balanced	—	1,430	—	1,210	—	706
Sun Life MFS Canadian Bond F	Canadian Fixed Income	★★★	488	★★★	439	★★★	290

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