

# Sun Life Granite Managed Portfolios

Broad diversification | Multi-manager approach | Tactical asset allocation

Fund name (Series F)	MORNINGSTAR OVERALL RATING™	SINCE INCEPTION Return %	10 YEAR Return %	7 YEAR Return %	5 YEAR Return %	3 YEAR Return %	1 YEAR Return %	INCEPTION DATE
Sun Life Granite Conservative Portfolio	★ ★ ★	3.2	3.0	1.2	0.7	-1.9	2.7	2012-04-02 *
Sun Life Granite Moderate Portfolio	★ ★ ★	5.2	4.7	2.8	2.1	0.3	5.5	2012-01-17
Sun Life Granite Balanced Portfolio	★ ★ ★ ★	6.0	5.5	3.6	2.8	1.3	6.7	2012-01-17
Sun Life Granite Balanced Growth Portfolio	★ ★ ★	6.8	6.2	4.3	3.4	2.3	8.1	2012-01-17
Sun Life Granite Growth Portfolio	★ ★ ★ ★	7.6	7.0	5.0	4.0	3.3	9.4	2012-01-17

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

\*On April 2, 2012, Sun Life Granite Conservative Portfolio underwent a merger that was a material change for the fund under applicable securities laws. As a result of this change, we are only permitted to show performance information for periods after the date of merger.

[sunlifeglobalinvestments.com/granite](https://sunlifeglobalinvestments.com/granite)

**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.** Sun Life Granite Managed Portfolios invest in mutual funds and/or exchange traded funds (ETFs). Commissions and trailing commissions are not payable on Series F units of the Fund but management fees and expenses may be associated with these 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.

Fund	Category	Morningstar 3-year rating	# Funds in category	Morningstar 5-year rating	# Funds in category	Morningstar 10-year rating	# Funds in category
Sun Life Granite Conservative Portfolio	Global fixed income balanced	★★	760	★★	623	★★★	273
Sun Life Granite Moderate Portfolio	Global neutral balanced	★★	1,315	★★	1,124	★★★	575
Sun Life Granite Balanced Portfolio	Global neutral balanced	★★★	1,315	★★★	1,124	★★★★	575
Sun Life Granite Balanced Growth Portfolio	Global equity balanced	★★	1,030	★★★	862	★★★	468
Sun Life Granite Growth Portfolio	Global equity balanced	★★★	1,030	★★★	862	★★★★	468

Morningstar Ratings reflect performance as of September 30, 2023 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](http://www.morningstar.ca).

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