

# Sun Life MFS Funds

## Edward Jones Focus List

Sun Life Global Investments mutual funds on your Focus List sub-advised by MFS Investment Management\*

### Sun Life MFS U.S. Growth Fund

★★★★ Overall Morningstar Rating™ – Series F

- Access the world's most innovative market through this actively managed U.S. equity fund.
- Invests in high quality companies with above average, sustainable earnings growth competitive advantages and proven management.
- A "quality growth" portfolio that takes a long-term, bottom-up approach, considering each company's financial condition and industry position.
- Seeks above-average businesses, often in sectors that are under-represented in Canada; a diversifier for Canadians who tend to be over-exposed to Financials, Energy and Materials

#### Fund Detail

<b>Inception Date:</b>	2010-10-01	
<b>Edward Jones Category:</b>	Growth & Income	
<b>Category:</b>	U.S. Equity	
<b>Series:</b>	A	F
<b>Code:</b>	SUN105	SUN405
<b>MER<sup>1</sup>:</b>	2.22%	1.06%

Also available in USD, T5, & T8 options.

Fund Performance	SINCE INCEPTION	10 YEAR	5 YEAR	3 YEAR	1 YEAR	1 MONTH	YTD
Series A	14.9%	12.9%	13.9%	12.0%	8.2%	-8.6%	-9.1%
Series F	16.2%	14.3%	15.3%	13.3%	9.5%	-8.5%	-8.8%
U.S. Equity Category Avg.	8.8%	10.1%	15.5%	10.1%	9.8%	-5.8%	-4.2%

Performance as of March 31, 2025

## Sun Life MFS International Value Fund

★★★★ Overall Morningstar Rating™ – Series F

- Invests in high-quality companies outside of Canada and the U.S. that are temporarily out of favour
- Rigorous, bottom-up analysis of business, risk and valuation helps to identify a portfolio of value stocks with the goal of providing long-term capital appreciation
- Seeks to avoid stocks with substantial downside risk, where valuations more than compensate for inherent risks
- Applies a long-term, research-driven approach, focused on picking stocks across full market cycles

### Fund Details

<b>Inception Date:</b>	2010-10-01	
<b>Edward Jones Category:</b>	Growth & Income	
<b>Category:</b>	International Equity	
<b>Series:</b>	A	F
<b>Code:</b>	SUN104	SUN404
<b>MER<sup>1</sup>:</b>	2.40%	1.24%

Also available in T5, & T8 options.

Fund Performance	SINCE INCEPTION	10 YEAR	5 YEAR	3 YEAR	1 YEAR	1 MONTH	YTD
Series A	9.2%	6.6%	7.8%	9.1%	12.7%	0.0%	7.9%
Series F	10.5%	7.9%	9.1%	10.3%	14.0%	0.1%	8.2%
Intl. Equity Category Avg.	6.4%	5.7%	10.8%	9.3%	9.3%	-1.2%	5.5%

Performance as of March 31, 2025

## Sun Life MFS International Opportunities Fund

★★★★ Overall Morningstar Rating™ – Series F

- Invests in larger “blue-chip” companies outside of Canada and the U.S. with durable and sustainable business models, helping provide clients with potentially stable long-term investments
- Managed with a long-term investment horizon
- Applies a long-term, research-driven approach, focused on picking stocks across full market cycles

### Fund Details

<b>Inception Date:</b>	2010-10-01	
<b>Edward Jones Category:</b>	Growth & Income	
<b>Category:</b>	International Equity	
<b>Series:</b>	A	F
<b>Code:</b>	SUN103	SUN403
<b>MER<sup>1</sup>:</b>	2.22%	1.06%

Also available in USD, T5, & T8 options.

Fund Performance	SINCE INCEPTION	10 YEAR	5 YEAR	3 YEAR	1 YEAR	1 MONTH	YTD
Series A	7.8%	7.2%	9.7%	9.6%	13.5%	-2.5%	4.2%
Series F	9.0%	8.5%	11.0%	10.9%	14.8%	-2.4%	4.5%
Intl. Equity Category Avg.	6.4%	5.7%	10.8%	9.3%	9.3%	-1.2%	5.5%

Performance as of March 31, 2025

## Sun Life MFS Global Growth Fund

★★★★★ Overall Morningstar Rating™ – Series F

- Invests in “blue-chip” companies located anywhere in the world with durable and sustainable business models, to help provide investment stability
- A portfolio of growth stocks for investors with a long-term investment horizon
- Looks for companies with above average growth and return potential – without overpaying

### Fund Details

<b>Inception Date:</b>	2010-09-30	
<b>Edward Jones Category:</b>	Growth & Income	
<b>Category:</b>	Global Equity	
<b>Series:</b>	A	F
<b>Code:</b>	SUN100	SUN400
<b>MER<sup>1</sup>:</b>	2.20%	1.06%

Also available in USD, T5, & T8 options.

Fund Performance	SINCE INCEPTION	10 YEAR	5 YEAR	3 YEAR	1 YEAR	1 MONTH	YTD
Series A	11.2%	9.7%	11.7%	7.8%	5.5%	-5.0%	-3.6%
Series F	12.4%	10.9%	13.0%	9.0%	6.8%	-4.9%	-3.4%
Global Equity Category Avg.	10.2%	7.7%	12.7%	8.9%	9.3%	-4.3%	-1.4%

Performance as of March 31, 2025

## Sun Life MFS Global Total Return Fund

★★★★★ Overall Morningstar Rating™ – Series F

- A well-diversified core global balanced solution combining a strategic mix of 60% equities and 40% fixed income securities
- Employs a total return strategy that seeks to provide both growth and income to investors
- The equity portion is designed to be the main driver of long-term performance; the fixed income component is designed to help reduce volatility
- Global fixed income exposure is focused on investment grade corporate bonds

### Fund Details

<b>Inception Date:</b>	2010-10-01	
<b>Edward Jones Category:</b>	Growth & Income	
<b>Category:</b>	Global Neutral Balanced	
<b>Series:</b>	A	F
<b>Code:</b>	SUN102	SUN402
<b>MER<sup>1</sup>:</b>	2.18%	1.01%

Also available in USD & T5 options.

Fund Performance	SINCE INCEPTION	10 YEAR	5 YEAR	3 YEAR	1 YEAR	1 MONTH	YTD
Series A	6.4%	4.5%	6.9%	6.0%	7.0%	-0.9%	2.8%
Series F	7.6%	5.7%	8.2%	7.2%	8.3%	-0.8%	3.1%
Global Neutral Bal. Category	6.2%	4.7%	7.8%	5.7%	8.9%	-1.9%	0.7%

Performance as of March 31, 2025

# Sun Life MFS U.S Value Fund

★★★ Overall Morningstar Rating™ – Series F

<ul style="list-style-type: none"><li>• An actively managed U.S. equity fund with a tilt to undervalued, larger companies</li><li>• Invests in high-quality, sustainable businesses that are under-appreciated by the market</li><li>• Seeks strong performance by taking advantage of shorter-term influences on stock prices, while being mindful of risk</li><li>• Applies a long-term, research-driven approach, focused on picking stocks across full market cycles</li></ul>					<b>Fund Details</b>		
					<b>Inception Date:</b>	2010-10-01	
					<b>Edward Jones Category:</b>	Growth & Income	
					<b>Category:</b>	U.S Equity	
					<b>Series:</b>	A	F
					<b>Code:</b>	SUN106	SUN406
					<b>MER<sup>1</sup>:</b>	2.22%	1.06%
					Also available in USD, T5, & T8 options.		
<b>Fund Performance</b>	<b>SINCE INCEPTION</b>	<b>10 YEAR</b>	<b>5 YEAR</b>	<b>3 YEAR</b>	<b>1 YEAR</b>	<b>1 MONTH</b>	<b>YTD</b>
Series A	11.2%	8.2%	13.0%	9.9%	11.2%	-2.4%	3.4%
Series F	12.4%	9.4%	14.4%	11.2%	12.5%	-2.3%	3.7%
U.S Equity Category Avg.	8.8%	10.1%	15.5%	10.1%	9.8%	-5.8%	-4.2%

Performance as of March 31, 2025

<sup>1</sup>MERs as of December 31, 2024.

Source: Morningstar. Data as of March 31, 2025.

\*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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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.

The Morningstar Rating™ for funds, or "star rating", is calculated for managed products (including mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed-end funds, and separate accounts) with at least a three-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics. The weights are: 100% three-year rating for 36-59 months of total returns, 60% five-year rating/40% three-year rating for 60-119 months of total returns, and 50% 10-year rating/30% five-year rating/20% three-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent three-year period actually has the greatest impact because it is included in all three rating periods.

For more details on the calculation of Morningstar star ratings or quartile rankings, please see [www.morningstar.ca](http://www.morningstar.ca).

Fund name – Series F	Category	3 YEAR		5 YEAR		10 YEAR	
		Morningstar Rating	# Funds in category	Morningstar Rating	# Funds in category	Morningstar Rating	# Funds in category
Sun Life MFS U.S. Growth	U.S. equity	★★★	1,023	★★	556	★★★★★	556
Sun Life MFS International Value	International equity	★★★	597	★★	299	★★★★★	299
Sun Life MFS International Opportunities	International equity	★★★	597	★★★	299	★★★★★	299
Sun Life MFS Global Growth	Global equity	★★★	1,550	★★★	658	★★★★★	658
Sun Life MFS Global Total Return	Global neutral balanced	★★★★★	1,482	★★★	724	★★★★★	724
Sun Life MFS U.S Value Fund	U.S Equity	★★★	1,023	★★★	556	★★★	556

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