

SUN LIFE GLOBAL INVESTMENTS:
**FUNDS APPROVED
AT EDWARD JONES**

FUND RESOURCE GUIDE

ADVISOR USE ONLY



A man in a suit is walking across a city street at sunset. The scene is bathed in a warm, orange-red light. In the background, a large, modern building with many windows is visible. A car is parked on the left, and another car is driving on the right. The man is walking towards the right side of the frame.

Sun Life Global Investments

Helping you create trusted relationships
that meet the needs of your clients.

Sun Life Global Investments

At Sun Life Global Investments, we are committed to helping Canadians build wealth and mitigate financial risk.

We offer investors 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 most experienced asset managers from around the world - to deliver a truly global investment platform.

Sun Life Global Investments: By the numbers

- We work with **institutional managers** to offer mandates not available elsewhere in Canada to retail investors
- **150+ years** of growing and protecting wealth for Canadians¹
- Sun Life Global Investments: **\$50+ billion** AUM; Sun Life: **\$1.52 trillion** in global AUM²
- **Scale = pricing power** and broad global reach
- Insurance roots = **strong risk management culture**

Our sub-advisor model

Building wealth today requires you to look beyond Canada's borders. We select global managers from other firms, who share our vision and objectives, to sub-advise funds built for our product shelf.

Hiring these managers allow us to bring additional investment expertise to Canadian investors. One of these sub-advisor relationships includes MFS Investment Management, a member of the Sun Life Group of Companies.



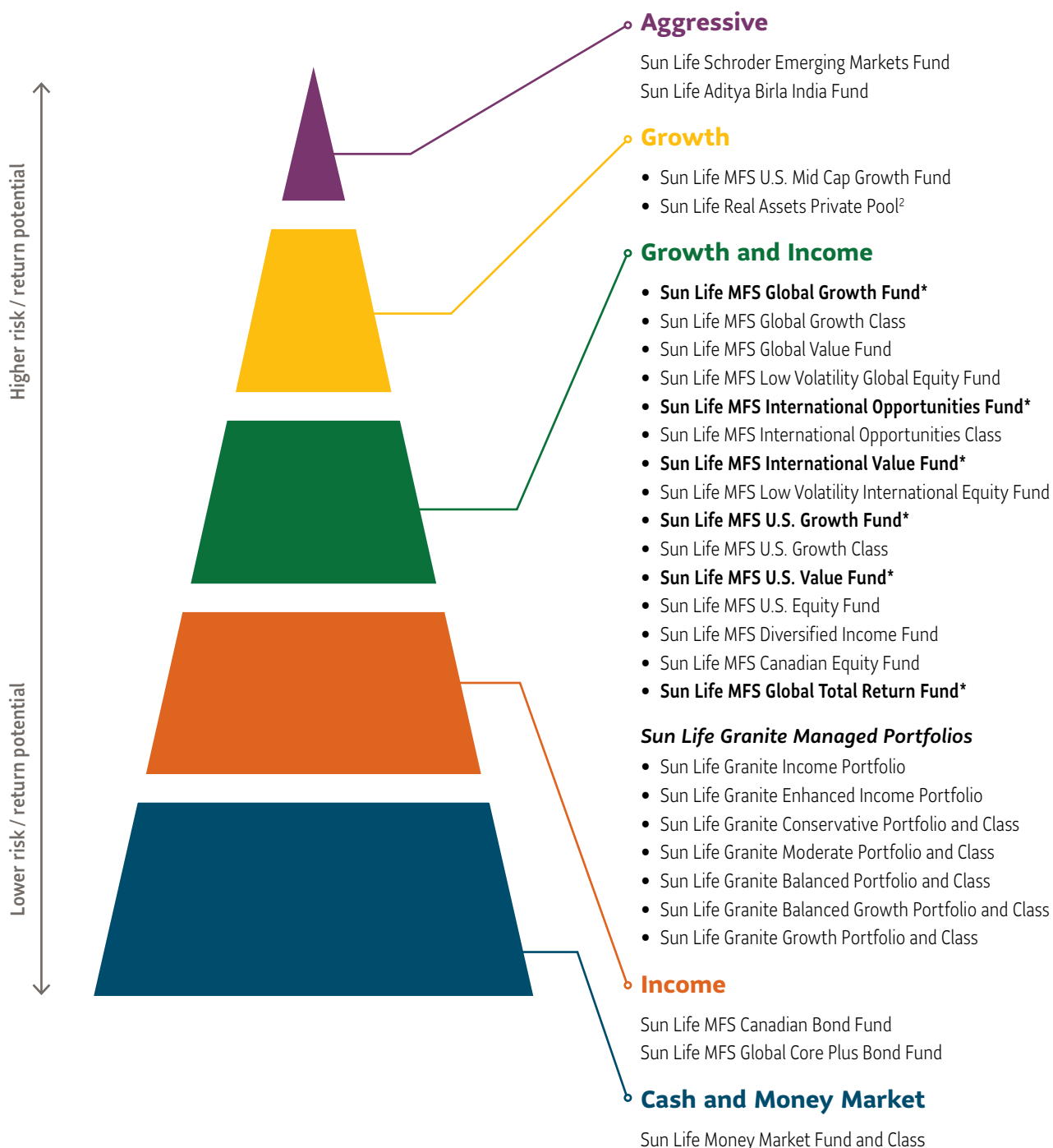
Since 1924, MFS Investment Management has guided American investors through every market condition on record. Today, our exclusive lineup of Sun Life MFS Funds brings Canadian investors the power of their deep-rooted history and expertise.

¹ Sun Life, since 1865.

² AUM as of September 30, 2024. Includes Institutional, mutual funds, payout annuities, guaranteed and Sun GIF. Institutional mandates are sub-advised by SLGI and offered as segregated funds by Sun Life Assurance Company of Canada through Group Retirement Services.

Edward Jones Investment Pyramid¹

The following funds have been approved by Edward Jones:



¹ The investment categories shown are based on Edward Jones' proprietary investment classification system. These should not be confused with a mutual fund's investment risk rating. For convenience, risk ratings are provided on the next page, and these are updated and disclosed in the mutual funds' Fund Fact Sheets and Simplified Prospectus.

² Check your product X-ray for Growth and Growth and Income allocations (based on portfolio holdings).

*Sun Life Global Investment funds that have been selected by the Edward Jones Mutual Fund Research team for the Edward Jones Focus List.

Fund codes

All fund codes preceded by "SUN"

Fund name	Investment risk	Series A		Series T5 ¹	Series T8 ¹	Series			
		ISC		ISC	ISC	F	F5 ²	F8 ²	
		CAD	USD			CAD	USD		
Aggressive									
Sun Life Schroder Emerging Markets Fund	Medium	120	U120	-	-	420	U420	-	-
Sun Life Aditya Birla India Fund	High	L100	L810	-	-	L600	L800	-	-
Growth									
Sun Life MFS U.S. Mid Cap Growth Fund	Medium	168	U168	-	-	468	U468	-	-
Sun Life Real Assets Private Pool	Medium	185	-	-	-	485	-	-	-
Growth and Income									
Sun Life MFS Global Growth Fund*	Medium	100	U100	126	137	400	U400	-	-
Sun Life MFS Global Growth Class	Medium	5100	-	5126	5137	5400	-	-	-
Sun Life MFS Global Value Fund*	Medium	101	-	127	138	401	-	-	-
Sun Life MFS Diversified Income Fund	Low to medium	172	-	-	-	472	-	-	-
Sun Life MFS Low Volatility Global Equity Fund	Medium	1103	-	1104	1105	1403	-	-	-
Sun Life MFS International Opportunities Fund*	Medium	103	U103	128	139	403	U403	-	-
Sun Life MFS International Opportunities Class	Medium	5103	-	5128	5139	5403	-	-	-
Sun Life MFS International Value Fund*	Medium	104	-	129	140	404	-	-	-
Sun Life MFS Low Volatility International Equity Fund	Low to medium	1106	-	1107	1108	1406	-	-	-
Sun Life MFS U.S. Growth Fund*†	Medium	105	U105	131	142	405	U405	F5405	-
Sun Life MFS U.S. Growth Class	Medium	5105	-	5131	5142	5405	-	-	-
Sun Life MFS U.S. Value Fund†	Medium	106	U106	132	143	406	U406	-	F8406
Sun Life MFS U.S. Equity Fund	Medium	156	-	-	-	456	-	-	-
Sun Life MFS Canadian Equity Fund	Low to medium	166	-	-	-	466	-	-	-
Sun Life MFS Global Total Return Fund*	Low to medium	102	U102	130	-	402	U402		-
Sun Life Granite Managed Portfolios									
Sun Life Granite Income Portfolio	Low to medium	175	-	-	-	475	-	F5475	-
Sun Life Granite Enhanced Income Portfolio	Low to medium	176	-	-	-	476	-	-	-
Sun Life Granite Conservative Portfolio	Low	144	-	145	-	444	-	F5444	-
Sun Life Granite Conservative Class	Low	5144	-	5145	-	5444	-	55444	-
Sun Life Granite Moderate Portfolio	Low to medium	146	-	147	-	446	-	F5446	-
Sun Life Granite Moderate Class	Low to medium	5146	-	5147	-	5446	-	55446	-
Sun Life Granite Balanced Portfolio	Low to medium	148	-	149	-	448	-	F5448	-
Sun Life Granite Balanced Class	Low to medium	5148	-	5149	-	5448	-	55448	-
Sun Life Granite Balanced Growth Portfolio	Low to medium	150	-	151	152	450	-	F5450	F8450
Sun Life Granite Balanced Growth Class	Low to medium	5150	-	5151	-	5450	-	55450	85450
Sun Life Granite Growth Portfolio	Low to medium	153	-	154	155	453	-	F5453	F8453
Sun Life Granite Growth Class	Low to medium	5153	-	5154	-	5453	-	55453	85453
Income									
Sun Life MFS Canadian Bond Fund	Low	174	-	-	-	474	-	-	-
Sun Life MFS Global Core Plus Bond Fund ³	Low	L111	L841	-	-	L611	L805	-	-
Cash and Money Market									
Sun Life Money Market Fund	Low	107	-	-	-	407	-	-	-
Sun Life Money Market Class	Low	5107	-	-	-	5407	-	-	

ISC = Initial sales charge; Series F and other fee-based series equivalents are no sales charge (NSC)

¹ For corporate class, Series T5 and Series T8 is named Series AT5 and AT8, respectively.

² For corporate class, Series F5 and F8 is named Series FT5 and FT8, respectively.

³ On June 28, 2024, the Sun Life Amundi Emerging Markets Debt Fund (the "Fund") underwent a change in investment objective, its sub-advisor changed to MFS Investment Management Canada Limited, and the Fund was renamed the Sun Life MFS Global Core Plus Bond Fund. On that same date, the Sun Life Global Tactical Yield Private Pool was merged into the Fund.

† Also available in a currency hedged option. Please check with your Mutual Fund Marketing Department.

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About Sun Life Global Investments

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 experienced asset managers from around the world to deliver a truly global investment platform. For more information, please visit sunlifeglobalinvestments.com.



For more information, contact your Wealth Sales Team or:

Visit sunlifeglobalinvestments.com | Call **1-877-837-7844** |

Email supportwealth@sunlife.com

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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. The MFS® logo is a trademark of The Massachusetts Financial Services Company and is used with permission.

The Sun Life Granite Managed Solutions invest in other mutual funds and/or ETFs. The Sun Life Global Investments corporate class mutual funds each represent a separate class of shares of Sun Life Global Investments Corporate Class Inc., a mutual fund corporation.

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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