

Sun Life Granite Managed Portfolios

Broad diversification | Multi-manager approach | Tactical asset allocation

A one-stop solution to help Clients achieve lifetime financial security without a lot of worry. No matter what stage of life or the type of investor, Sun Life GIFs Granite Managed Portfolios offer a wide range of diversified portfolios that can help to meet your Client's needs. Combine that diversification with the value of maturity and death benefit guarantees, as well as the insurance benefits of Sun Life GIF contracts, and you have a solution that is built for a lifetime.

INVESTMENT SERIES FEL/DSC/LL/CB	MORNINGSTAR OVERALL RATING	1 YEAR RETURN %	3 YEAR RETURN %	5 YEAR RETURN %	SINCE INCEPTION	INCEPTION DATE
Sun Life Granite Managed Portfolios						
Sun GIF Solutions Sun Life Granite Conservative	★★	5.5	-2.2	1.1	1.0	2015-05-04
Sun GIF Solutions Sun Life Granite Moderate	★★	6.8	-0.5	2.9	2.4	2015-05-04
Sun GIF Solutions Sun Life Granite Balanced	★★	7.4	0.2	3.9	3.0	2015-05-04
Sun GIF Solutions Sun Life Granite Balanced Growth	★★	8.0	1.0	4.7	3.7	2015-05-04
Sun GIF Solutions Sun Life Granite Growth	★★★	8.6	1.8	5.5	4.2	2015-05-04
Sun Life Granite Managed Income Portfolios						
Sun GIF Solutions Sun Life Granite Enhanced Income	★★	4.7	0.6	2.9	1.6	2015-05-04
Sun GIF Solutions Sun Life Granite Income	★★	4.3	-0.8	2.1	1.2	2015-05-04

Returns for periods longer than one year are annualized. Data as December 31, 2023. Source: Morningstar.

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.

STAR RATINGS: Sun GIF Solutions Sun Life Granite Conservative, Global Fixed Income Balanced 2 stars (327 funds), 5 years 2 stars (256 funds); Sun GIF Solutions Sun Life Granite Moderate, Global Neutral Balanced 1 stars (789 funds), 5 years 2 stars (663 funds); Sun GIF Solutions Sun Life Granite Balanced, Global Neutral Balanced 2 stars (789 funds), 5 years 2 stars (663 funds); Sun GIF Solutions Sun Life Granite Balanced Growth, Global Equity Balanced 2 stars (917 funds), 5 years 2 stars (800 funds); Sun GIF Solutions Sun Life Granite Growth, Global Equity Balanced 2 stars (917 funds), 5 years 3 stars (800 funds); Sun GIF Solutions Sun Life Granite Enhanced Income, Tactical Balanced 2 stars (183 funds), 5 years 2 stars (180 funds); Sun GIF Solutions Sun Life Granite Income, Tactical Balanced 1 stars (183 funds), 5 years 2 stars (180 funds);

The Morningstar Rating™ for funds, or “star rating”, is calculated for managed products (including mutual funds, variable annuity and variable life sub accounts, 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 information, see www.morningstar.ca.

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