






Sun Life MFS Diversified Strategies

Investment Series 75/75

Five distinct strategies, each specifically designed to offer unique blends of investment funds sub-advised by MFS Investment management. Growth potential and diversification combined with the benefits and guarantees of a segregated fund insurance contract. All with an attractive price point, unique architecture and added protection, a powerful solution for Clients.

Sun GIF Solutions MFS Diversified Balanced	Sun GIF Solutions MFS Diversified Canadian Equity	Sun GIF Solutions MFS Diversified US Equity	Sun GIF Solutions MFS Diversified International Equity	Sun GIF Solutions MFS Diversified Global Equity
				
<ul style="list-style-type: none"> 30% Sun Life MFS Canadian Bond Fund 40% Sun Life MFS Global Growth Fund 10% Sun Life MFS Canadian Equity Fund 20% Sun Life MFS Low Volatility Global Equity Fund 	<ul style="list-style-type: none"> 70% Sun Life MFS Canadian Equity Fund 10% Sun Life MFS US Growth Fund 10% Sun Life MFS US Value Fund 10% Sun Life MFS US Equity Fund 	<ul style="list-style-type: none"> 40% Sun Life MFS US Growth Fund 30% Sun Life MFS US Value Fund 30% Sun Life MFS US Equity Fund 	<ul style="list-style-type: none"> 70% Sun Life MFS International Opportunities Fund 30% Sun Life MFS Low Volatility Int'l Equity Fund 	<ul style="list-style-type: none"> 40% Sun Life MFS Global Growth Fund 30% Sun Life MFS Global Value Fund 30% Sun Life MFS Low Volatility Global Equity Fund

As of December 31, 2024	Return (%)			Standard deviation (%)		
Fund/Benchmark	5 Years	3 Years	1 Years	5 Years	3 Years	1 Years
Sun GIF Solutions MFS Diversified Balanced	7.61	5.28	16.10	10.16	10.21	6.53
Benchmark: 60% MSCI AC World C\$, 30% FTSE Cdn Universe Bond, 10% S&PTX Capped Comp	8.87	6.77	20.05	10.49	10.54	5.98
Sun GIF Solutions MFS Diversified Canadian Equity	10.85	9.42	23.76	13.81	11.92	9.37
Benchmark: 70% S&PTX Capped, 20% Russell 1000 C\$, 10% S&P500 C\$	12.85	10.10	25.95	14.93	13.37	9.11
Sun GIF Solutions MFS Diversified U.S. Equity	13.62	10.14	32.33	13.67	13.58	10.01
Benchmark: 70% Russell 1000 C\$, 30% S&P500 C\$	16.75	13.37	35.97	14.31	14.17	9.50
Sun GIF Solutions MFS Diversified International Equity	6.96	5.38	17.04	11.76	12.65	7.32
Benchmark: MSCI EAFE NR CAD	6.92	6.14	13.24	13.11	12.77	7.10
Sun GIF Solutions MFS Diversified Global Equity	10.17	8.10	19.62	11.53	11.40	7.75
Benchmark: 70% MSCI AC World C\$, 30% MSCI World C\$	12.70	10.38	28.53	13.04	12.77	7.24

* 1- and 3-year returns shown are based on Series F Investment Series. The 5-year shown is back - tested data.

ADVISOR USE ONLY

Sun Life MFS Diversified Strategies

Investment Series 75/75

- \$100,000 minimum initial investment
- Four sales charge options to choose from
- Competitive pricing
- Access MFS Investment Managements' powerful risk-management and long-term vision, designed to create great financial outcomes

Sun GIF Solutions Investment Series:

- The ability for the death benefit value to bypass probate and seamlessly transfer to beneficiaries, saving time and simplifying the estate settlement process.
- Potential to reduce probate fees¹ associated with settling the total estate, as the funds invested are excluded from the probate process.
- Maturity and death benefit guarantees² – to provide an extra layer of certainty.
- Potential creditor protection, to protect personal assets from professional liabilities, providing extra protection for business owners.

¹Probate, executor, accounting, and legal fees may vary by province. ²Withdrawals affect the value of contract guarantees.

Fund name	FEL/CB MER	FEL fund codes (SLF)	Chargeback fund codes (SLF)	F class MER	F class fund codes (SLF)	O class MER **	O class fund codes (SLF)	Risk rating
Sun GIF Solutions MFS Diversified Balanced	2.23	SI194	SI794	1.07	SI694	0.47	SI594	low-to-medium
Sun GIF Solutions MFS Diversified Canadian Equity	2.35	SI195	SI795	1.20	SI695	0.55	SI595	medium
Sun GIF Solutions MFS Diversified U.S. Equity	2.42	SI196	SI796	1.32	SI696	0.47	SI596	medium
Sun GIF Solutions MFS Diversified International Equity	2.40	SI197	SI797	1.31	SI697	0.54	SI597	medium
Sun GIF Solutions MFS Diversified Global Equity	2.34	SI198	SI798	1.29	SI698	0.56	SI598	low-to-medium

- ** The MER for O class does not include management fees or the advisor service fee, which are both paid by the redemption of units from the contract. MERs for new funds are estimates. All MERs shown are as of December 31, 2023



For more information on how Sun Life MFS Diversified Strategies can help your Clients on their path to reaching their financial goals:

Visit sunlifeglobalinvestments.com | Call **1-844-753-4437** | Email supportwealth@sunlife.com

The indicated rates of return in the back-tested data 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.

MFS Investment Management are the sub-advisors for the underlying mutual funds held within the Sun Life MFS Diversified Strategies segregated fund.

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 some of the best asset managers from around the world to deliver a truly global investment platform. For more information, please visit sunlifeglobalinvestments.com or follow us on Twitter @SLGI_Canada.

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.

Sun Life Assurance Company of Canada is the issuer of guaranteed insurance contracts, including Accumulation Annuities (Insurance GICs), Payout Annuities, and Individual Variable Insurance Contracts (Sun Life GIFs). 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.

© SLGI Asset Management Inc. and its licensors, 2025. SLGI Asset Management Inc. is a member of the Sun Life group of companies. All rights reserved.