



Our 13th straight year

MFS' Consistent Long-Term Performance Recognized by *Barron's*

Aligned with client needs

At MFS®, our goal is to deliver consistent long-term results to help investors meet their investment objectives. To do this, we strive to create value for our clients by allocating capital responsibly. Through our collective expertise, long-term discipline and active risk management, we've not only delivered competitive results over the long term but also through challenging market environments such as 2008, 2015 and 2020, when investors needed them most.

Successful long-term results

Barron's rankings of MFS Family of Funds® (based on performance as of 12/31 for year listed)

	10-YEAR	5-YEAR	1-YEAR
2020	# 6 OUT OF 44	# 6 OUT OF 50	# 34 OUT OF 53
2019	# 4 OUT OF 45	# 2 OUT OF 52	# 1 OUT OF 55
2018	# 8 OUT OF 49	# 9 OUT OF 55	# 12 OUT OF 57
2017	# 2 OUT OF 49	# 10 OUT OF 53	# 12 OUT OF 58
2016	# 2 OUT OF 53	# 9 OUT OF 54	# 22 OUT OF 61
2015	# 2 OUT OF 52	# 1 OUT OF 58	# 5 OUT OF 67
2014	# 5 OUT OF 48	# 13 OUT OF 56	# 41 OUT OF 65
2013	# 2 OUT OF 48	# 10 OUT OF 55	# 10 OUT OF 64
2012	# 5 OUT OF 46	# 9 OUT OF 53	# 9 OUT OF 62
2011	# 7 OUT OF 45	# 3 OUT OF 53	# 10 OUT OF 58
2010	# 13 OUT OF 46	# 4 OUT OF 53	# 38 OUT OF 57
2009	# 4 OUT OF 48	# 7 OUT OF 54	# 24 OUT OF 61
2008	# 5 OUT OF 48	# 4 OUT OF 53	# 4 OUT OF 59

The calendar year rankings above indicate the year for which rankings were calculated.

Talk to your investment professional about how MFS can help you pursue your long-term goals.

Past performance is no guarantee of future results.

Keep in mind that all investments, including mutual funds, carry a certain amount of risk, including the possible loss of the principal amount invested.

Source: *Barron's*, "Best Fund Families for 2020," February 20, 2021. *Barron's* rankings are based on asset-weighted returns in five categories — US equity funds; world equity funds (including international and global portfolios); mixed equity funds (which invest in stocks, bonds and other securities); taxable bond funds; and tax-exempt funds — as calculated by Lipper. *Barron's* did not include sales charges in calculating returns. Each fund's return was measured against those of all funds in its Lipper category, resulting in a percentile ranking which was then weighted by asset size, relative to the fund family's other assets in its general classification. To qualify for Lipper/*Barron's* Fund Survey, a group must have had at least three funds in Lipper's general equity category, one world equity category, one mixed-asset (such as balanced or target-date fund), at least two taxable-bond funds and one national tax-exempt bond fund. Beginning in 2017, previously excluded single-sector and country equity funds are factored into the rankings as general equity. The rankings exclude all passive index funds, including pure index, enhanced index and index-based, but include actively managed ETFs and so-called smart-beta ETFs, which are passively managed but created from active strategies.

Consistent rankings over the past 13 years:

- 92% of the time (24/26) ranked in top 10 for 5- and 10-year periods
- 72% of the time (28/39) ranked in top 10 for 1-, 5- and 10-year periods
- Only fund family that has had 6 years in the top 10 across all time frames since 2008

Before investing, consider the fund's investment objectives, risks, charges and expenses. For a prospectus or summary prospectus containing this and other information, contact your investment professional or view online at mfs.com. Please read it carefully.