

As of February 29, 2024



# Class A MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
STOCK FUNDS																		
(a)	Massachusetts Investors Growth Stock Fund	01/01/35	(N/A)	MIGFX	5.75	13.26	15.06	10.04	28.22	5.74	12.59	13.71	7.89	20.84	-0.34	0.71	0.71	—
(a)	Massachusetts Investors Trust	07/15/24	(N/A)	MITTX	5.75	11.01	12.66	9.80	26.35	6.88	10.35	11.33	7.65	19.09	0.73	0.70	0.70	—
(a)	MFS® Blended Research® Core Equity Fund	08/07/97	(N/A)	MUEAX	5.75	11.46	14.66	13.39	33.58	8.39	10.80	13.31	11.18	25.90	2.16	0.81	0.74	01/31/25
(a)	MFS® Blended Research® Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWAX	5.75	14.44	16.46	11.59	45.92	10.29	13.64	15.09	9.41	37.53	3.94	0.86	0.74	09/30/24
(a)	MFS® Blended Research® Mid Cap Equity Fund	08/19/16	(N/A)	BMSFX	5.75	10.70	11.44	9.72	17.76	5.55	9.83	10.13	7.58	10.99	-0.52	0.94	0.84	09/30/24
(a)	MFS® Blended Research® Small Cap Equity Fund	09/15/15	(N/A)	BRSDX	5.75	8.83	6.21	3.73	11.52	1.33	8.07	4.96	1.70	5.11	-4.50	1.13	0.99	09/30/24
(a)	MFS® Blended Research® Value Equity Fund	09/15/15	(N/A)	BRUDX	5.75	10.03	10.05	11.14	17.62	4.97	9.26	8.75	8.97	10.85	-1.07	0.85	0.74	09/30/24
(a)	MFS® Core Equity Fund <sup>F1</sup>	01/02/96	(N/A)	MRGAX	5.75	11.88	13.66	10.14	27.41	6.82	11.22	12.32	7.99	20.09	0.68	0.92	0.91	12/31/24
(q)	MFS® Equity Income Fund	09/27/12	(N/A)	EQNAX	5.75	9.52	11.19	10.53	17.17	3.65	8.88	9.89	8.37	10.43	-2.31	0.96	0.89	11/30/24
(a)	MFS® Growth Fund	09/13/93	(N/A)	MFEGX	5.75	13.71	15.60	9.45	47.98	13.19	13.04	14.24	7.31	39.47	6.68	0.85	0.84	03/31/24
(a)	MFS® Intrinsic Value Fund	02/08/22	(N/A)	UIVFX	5.75	8.12	—	—	26.15	5.90	5.06	—	—	18.89	-0.19	8.15	0.94	11/30/24
(q)	MFS® Low Volatility Equity Fund	12/05/13	(N/A)	MLVAX	5.75	10.69	11.25	10.26	18.85	6.18	10.04	9.94	8.10	12.01	0.08	0.93	0.89	12/31/24
(a)	MFS® Mid Cap Growth Fund	12/01/93	(N/A)	OTCAX	5.75	11.20	11.47	2.95	26.00	8.75	10.54	10.15	0.93	18.75	2.50	1.05	1.04	12/31/24
(a)	MFS® Mid Cap Value Fund	08/31/01	(N/A)	MVCAX	5.75	8.61	10.43	9.23	11.83	3.59	7.97	9.13	7.10	5.40	-2.37	1.00	0.99	01/31/25
(a)	MFS® New Discovery Fund	01/02/97	(N/A)	MNDAX	5.75	7.84	7.43	-6.35	10.20	4.47	7.21	6.16	-8.18	3.86	-1.54	1.30	1.29	12/31/24
(a)	MFS® New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVAX	5.75	8.62	8.99	5.42	1.96	-1.31	7.98	7.70	3.36	-3.91	-6.99	1.20	1.19	06/30/24
(a)	MFS® Research Fund	10/13/71	(N/A)	MFRFX	5.75	11.38	13.26	10.22	28.77	6.94	10.72	11.92	8.06	21.36	0.79	0.80	0.80	—
(a)	MFS® Technology Fund	01/02/97	(N/A)	MTCAX	5.75	16.17	16.61	7.63	62.05	13.56	15.49	15.24	5.53	52.73	7.03	1.15	1.14	12/31/24
(m)	MFS® Total Return Fund	10/06/70	(N/A)	MSFRX	5.75	6.39	7.06	4.18	10.15	1.01	5.76	5.80	2.14	3.82	-4.80	0.73	0.73	—
(q)	MFS® Utilities Fund	02/14/92	(N/A)	MMUFX	5.75	5.27	5.20	4.17	-3.24	-5.69	4.65	3.96	2.14	-8.81	-11.11	1.03	1.02	02/28/25
(q)	MFS® Value Fund	01/02/96	(N/A)	MEIAX	5.75	8.85	9.65	8.95	13.61	4.08	8.20	8.36	6.82	7.08	-1.90	0.80	0.79	12/31/24

\* Periods less than one year are actual not annualized.

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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Class A shares ("A") results include the maximum sales charge.

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					Not Including Sales Charges					Including Sales Charges								
	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
ASSET ALLOCATION STRATEGIES																		
(a)	MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MAAGX	5.75	8.34	9.67	5.55	17.06	3.98	7.70	8.38	3.48	10.33	-1.99	1.03	1.02	09/30/24
(q)	MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACFX	5.75	4.58	5.14	1.57	9.85	1.22	3.96	3.90	-0.41	3.54	-4.60	0.84	0.84	—
(m)	MFS® Diversified Income Fund <sup>2</sup>	05/26/06	(N/A)	DIFAX	4.25	3.95	3.08	1.04	7.40	-0.32	3.50	2.19	-0.42	2.84	-4.55	0.95	0.89	06/30/24
(a)	MFS® Global Alternative Strategy Fund <sup>3</sup>	12/20/07	(N/A)	DVRAX	5.75	2.83	4.51	4.18	11.51	4.01	2.22	3.28	2.15	5.10	-1.97	1.57	1.37	02/28/25
(a)	MFS® Growth Allocation Fund	06/28/02	(N/A)	MAGWX	5.75	7.30	8.47	4.51	15.30	3.25	6.67	7.19	2.47	8.67	-2.69	0.97	0.96	09/30/24
(a)	MFS® Lifetime® 2025 Fund	11/02/12	(N/A)	LTTAX	5.75	4.88	5.03	1.67	9.00	0.85	4.26	3.79	-0.31	2.74	-4.95	0.96	0.72	08/31/24
(a)	MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTAX	5.75	6.14	6.55	3.04	11.26	1.61	5.51	5.29	1.02	4.86	-4.23	0.96	0.76	08/31/24
(a)	MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFEAX	5.75	7.22	8.21	4.73	14.07	2.59	6.58	6.93	2.68	7.51	-3.31	1.03	0.80	08/31/24
(a)	MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFAX	5.75	7.72	8.96	5.65	16.03	3.38	7.08	7.68	3.58	9.36	-2.57	1.03	0.82	08/31/24
(a)	MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMAX	5.75	7.94	9.33	6.02	16.44	3.58	7.30	8.04	3.95	9.75	-2.37	1.08	0.83	08/31/24
(a)	MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFSX	5.75	7.97	9.40	6.13	16.72	3.73	7.33	8.11	4.05	10.01	-2.23	1.08	0.83	08/31/24
(a)	MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFIAX	5.75	7.96	9.41	6.12	16.73	3.74	7.33	8.12	4.05	10.02	-2.22	1.14	0.83	08/31/24
(a)	MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJAX	5.75	9.78	9.43	6.09	16.72	3.78	8.89	8.14	4.01	10.01	-2.19	1.29	0.84	08/31/24
(a)	MFS® Lifetime® 2065 Fund	09/01/21	(N/A)	LFTFX	5.75	1.47	—	—	16.83	3.76	-0.91	—	—	10.12	-2.21	8.95	0.84	08/31/24
(m)	MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLAX	4.25	3.71	4.21	1.10	8.19	0.62	3.26	3.31	-0.35	3.59	-3.66	0.89	0.70	08/31/24
(a)	MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWAX	5.75	2.81	3.02	2.93	9.05	3.04	2.18	1.81	0.92	2.78	-2.89	1.52	1.42	09/30/24
(q)	MFS® Moderate Allocation Fund	06/28/02	(N/A)	MAMAX	5.75	5.95	6.82	2.87	12.48	2.22	5.32	5.56	0.86	6.01	-3.66	0.90	0.90	—
(a)	MFS® Prudent Investor Fund	01/18/18	(N/A)	FPPAX	5.75	3.43	3.60	0.72	10.91	-1.40	2.44	2.38	-1.25	4.53	-7.07	1.89	1.24	10/31/24

\* Periods less than one year are actual not annualized.

<sup>2</sup> Performance information prior to June 15, 2021 reflects time periods when the fund did not have an investment strategy of allocating a portion of its assets to investment grade quality debt instruments. The fund's investment strategies changed effective June 15, 2021.

<sup>3</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

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	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data
<b>GLOBAL/INTERNATIONAL FUNDS</b>																	
(a) MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKAX	5.75	5.57	2.07	-4.11	8.86	1.86	4.83	0.87	-5.99	2.61	-4.00	2.45	1.24	12/31/24
(a) MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXAX	5.75	5.79	6.47	3.29	10.94	1.71	5.05	5.22	1.27	4.56	-4.14	0.96	0.89	12/31/24
(a) MFS® Emerging Markets Equity Fund	10/24/95	(N/A)	MEMAX	5.75	1.71	-0.39	-7.40	7.09	-0.73	1.11	-1.57	-9.21	0.93	-6.44	1.38	1.31	09/30/24
(a) MFS® Emerging Markets Equity Research Fund	02/23/21	(N/A)	EEMPX	5.75	-8.20	—	-6.53	5.36	-1.07	-9.98	—	-8.36	-0.70	-6.76	11.57	1.31	11/30/24
(a) MFS® Global Equity Fund	09/07/93	(N/A)	MWEFX	5.75	7.23	8.20	4.04	11.95	2.39	6.59	6.92	2.01	5.51	-3.49	1.21	1.20	02/28/25
(a) MFS® Global Growth Fund	11/18/93	(N/A)	MWOFX	5.75	10.06	11.74	6.01	21.36	4.22	9.41	10.42	3.94	14.38	-1.77	1.33	1.22	02/28/25
(a) MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNAX	5.75	6.72	6.68	0.19	12.63	1.29	6.09	5.43	-1.77	6.16	-4.54	1.78	1.35	12/31/24
(a) MFS® Global Real Estate Fund	03/11/09	(N/A)	MGLAX	5.75	5.39	3.18	-0.42	2.86	-3.67	4.76	1.96	-2.36	-3.06	-9.21	1.20	1.19	12/31/24
(q) MFS® Global Total Return Fund	09/04/90	(N/A)	MFWTX	5.75	4.49	5.20	2.05	8.51	-0.18	3.87	3.96	0.05	2.27	-5.92	1.21	1.11	02/28/25
(a) MFS® International Diversification Fund	09/30/04	(N/A)	MDIDX	5.75	5.26	6.07	0.78	10.22	0.73	4.63	4.83	-1.19	3.88	-5.06	1.09	1.08	09/30/24
(a) MFS® International Equity Fund <sup>A1</sup>	02/08/23	01/31/96 (R6)	MIEJX	5.75	6.22	8.95	6.37	15.18	2.31	5.60	7.67	4.29	8.56	-3.57	1.02	1.01	10/31/24
(a) MFS® International Growth Fund	10/24/95	(N/A)	MGRAX	5.75	6.45	7.74	3.31	13.40	2.72	5.82	6.47	1.29	6.88	-3.18	1.09	1.08	09/30/24
(a) MFS® International Intrinsic Value Fund <sup>S2</sup>	10/24/95	(N/A)	MGIAX	5.75	6.87	7.05	1.90	13.91	1.93	6.24	5.79	-0.09	7.36	-3.93	1.04	1.03	09/30/24
(a) MFS® International Large Cap Value Fund	06/30/20	(N/A)	MKVBX	5.75	10.64	—	5.65	8.64	-0.46	8.87	—	3.59	2.39	-6.18	1.07	0.96	09/30/24
(a) MFS® International New Discovery Fund <sup>S3</sup>	10/09/97	(N/A)	MIDAX	5.75	4.06	3.21	-1.01	7.81	-1.21	3.44	2.00	-2.94	1.61	-6.89	1.32	1.31	01/31/25
(q) MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGAX	5.75	7.67	7.94	8.41	16.64	3.48	7.03	6.67	6.29	9.94	-2.47	1.02	0.99	12/31/24
(a) MFS® Research International Fund	01/02/97	(N/A)	MRSAX	5.75	4.19	6.51	1.87	10.21	1.31	3.57	5.25	-0.12	3.87	-4.52	1.05	1.04	12/31/24

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<sup>A1</sup> Performance for Class A shares for periods prior to their offering is derived from the performance of the fund's Class R6 shares, adjusted to take into account differences in sales loads and class-specific operating expenses, such as Rule 12b-1 fees and certain shareholder servicing (including sub-accounting) costs, if any. In addition, the performance shown for Class A shares for periods prior to their offering does not reflect any applicable fee reductions and waivers and expense reimbursements that were in effect prior to the offering of Class A shares. Please see the prospectus for additional information about performance and expenses.

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<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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BOND FUNDS																	
(m) MFS® Core Bond Fund	06/22/22	(N/A)	MCBEX	4.25	1.40	—	—	3.57	-1.45	-1.17	—	—	-0.83	-5.64	1.46	0.64	08/31/24
(m) MFS® Corporate Bond Fund	05/08/74	(N/A)	MFBFX	4.25	2.26	1.73	-2.93	6.17	-1.22	1.82	0.85	-4.33	1.66	-5.42	0.78	0.77	08/31/24
(m) MFS® Emerging Markets Debt Fund	03/17/98	(N/A)	MEDAX	4.25	2.57	1.32	-2.12	9.07	0.29	2.13	0.45	-3.52	4.44	-3.97	1.07	1.06	11/30/24
(m) MFS® Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLAX	4.25	0.24	0.82	-1.42	9.22	-2.64	-0.19	-0.05	-2.83	4.57	-6.78	1.25	1.11	02/28/25
(m) MFS® Global High Yield Fund	07/01/98	(N/A)	MHOAX	4.25	3.40	3.29	1.49	10.84	0.70	2.95	2.39	0.03	6.13	-3.58	1.21	1.06	05/31/24
(m) MFS® Global Opportunistic Bond Fund <sup>4,5</sup>	06/02/10	(N/A)	MGBAX	4.25	0.97	1.68	-1.82	5.12	-1.28	0.53	0.80	-3.23	0.65	-5.47	0.95	0.94	03/31/24
(m) MFS® Government Securities Fund <sup>P1</sup>	07/25/84	(N/A)	MFGSX	4.25	0.45	-0.37	-3.70	1.51	-1.83	0.01	-1.23	-5.08	-2.80	-6.01	0.77	0.76	06/30/24
(m) MFS® High Income Fund	02/17/78	(N/A)	MHITX	4.25	3.29	3.16	1.13	9.66	-0.00	2.84	2.26	-0.33	5.00	-4.25	0.89	0.88	05/31/24
(m) MFS® Income Fund <sup>P1,6</sup>	10/29/87	(N/A)	MFIOX	4.25	2.05	1.67	-2.32	5.00	-1.04	1.61	0.80	-3.73	0.54	-5.25	0.90	0.73	02/28/25
(q) MFS® Inflation-Adjusted Bond Fund	09/30/03	(N/A)	MIAAX	4.25	1.28	1.84	-1.74	0.80	-0.88	0.84	0.96	-3.15	-3.48	-5.09	0.82	0.64	02/28/25
(m) MFS® Limited Maturity Fund	02/26/92	(N/A)	MQLFX	2.50	1.44	1.86	0.46	5.45	0.31	1.18	1.35	-0.39	2.81	-2.20	0.73	0.57	08/31/24
(m) MFS® Municipal High Income Fund	02/24/84	(N/A)	MMHYX	4.25	3.60	1.68	-1.16	6.33	1.01	3.15	0.80	-2.58	1.81	-3.28	0.66	0.61	05/31/24
(m) MFS® Municipal Income Fund	09/07/93	(N/A)	MFIAX	4.25	2.82	1.71	-0.60	6.16	0.21	2.37	0.83	-2.03	1.65	-4.05	0.77	0.76	07/31/24
(m) MFS® Municipal Intermediate Fund	05/18/21	(N/A)	MIUAX	4.25	-0.47	—	—	5.63	0.22	-2.01	—	—	1.14	-4.04	0.93	0.70	07/31/24
(m) MFS® Municipal Limited Maturity Fund	03/17/92	(N/A)	MTLFX	2.50	1.61	1.39	0.03	4.35	0.20	1.35	0.88	-0.81	1.74	-2.31	0.72	0.59	08/31/24
(m) MFS® Total Return Bond Fund	01/04/99	(N/A)	MRBFX	4.25	1.65	1.11	-2.76	4.42	-1.21	1.21	0.23	-4.16	-0.02	-5.41	0.78	0.60	08/31/24

\* Periods less than one year are actual not annualized.

<sup>4</sup> Performance information prior to December 1, 2014, reflects time periods when the fund had (i) a policy of focusing its investments on debt instruments of U.S. and foreign governments and (ii) a policy permitting the fund to invest up to 100% of its assets in less than investment grade quality debt instruments (lower quality debt instruments). The fund's investment policies and strategies changed effective December 1, 2014.

<sup>5</sup> Performance information prior to April 30, 2021, reflects time periods when the fund (i) had a policy of primarily investing in investment grade quality debt instruments and (ii) did not have a policy to engage in a currency hedging strategy to primarily expose the fund to the U.S. dollar. The fund's investment policies and strategies changed effective April 30, 2021.

<sup>6</sup> Performance information prior to December 2, 2019 reflects time periods when the fund had (i) a policy permitting the fund to invest up to 100% of its assets in below investment grade quality debt instruments and (ii) a policy permitting the fund to invest in equity securities as a principal investment strategy. The fund's investment policies and strategies changed effective December 2, 2019.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>P1</sup> A portion of the fund's distributions may include a return of capital for shareholders. Distributions that are treated for federal income tax purposes as a return of capital will reduce a shareholder's tax basis in his or her shares and, to the extent the distribution exceeds a shareholder's adjusted tax basis, will be treated as a gain to the shareholder from a sale of shares.

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Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.

Class A shares ("A") results include the maximum sales charge.

As of February 29, 2024



## Class A MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*				
Class A Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)												Gross	Net	Waiver End Data	
STATE TAX-ADVANTAGED BOND FUNDS**																		
(m)	MFS® Alabama Municipal Bond Fund	02/01/90	(N/A)	MFALX	4.25	2.31	1.28	-0.83	5.83	-0.13	1.86	0.41	-2.26	1.33	-4.37	1.05	0.90	07/31/24
(m)	MFS® Arkansas Municipal Bond Fund	02/03/92	(N/A)	MFARX	4.25	2.31	1.43	-0.51	5.18	-0.15	1.87	0.55	-1.94	0.71	-4.40	0.93	0.70	07/31/24
(m)	MFS® California Municipal Bond Fund	06/18/85	(N/A)	MCCTX	4.25	2.97	1.65	-0.71	6.05	0.04	2.53	0.77	-2.14	1.54	-4.21	0.86	0.70	07/31/24
(m)	MFS® Georgia Municipal Bond Fund	06/06/88	(N/A)	MMGAX	4.25	2.22	1.26	-0.70	5.30	-0.21	1.78	0.39	-2.13	0.82	-4.45	0.96	0.90	07/31/24
(m)	MFS® Maryland Municipal Bond Fund	10/31/84	(N/A)	MFSMX	4.25	2.33	1.49	-0.50	5.74	-0.16	1.89	0.61	-1.93	1.24	-4.40	0.98	0.83	07/31/24
(m)	MFS® Massachusetts Municipal Bond Fund	04/09/85	(N/A)	MFSSX	4.25	2.42	1.34	-0.71	5.55	0.02	1.97	0.46	-2.14	1.06	-4.23	0.86	0.82	07/31/24
(m)	MFS® Mississippi Municipal Bond Fund	08/06/92	(N/A)	MISSX	4.25	2.12	1.13	-1.04	4.63	-0.20	1.68	0.26	-2.46	0.18	-4.44	1.01	0.85	07/31/24
(m)	MFS® New York Municipal Bond Fund	06/06/88	(N/A)	MSNYX	4.25	2.55	1.41	-0.85	6.64	0.18	2.11	0.53	-2.28	2.11	-4.08	0.91	0.83	07/31/24
(m)	MFS® North Carolina Municipal Bond Fund	10/31/84	(N/A)	MSNCX	4.25	2.27	1.38	-0.65	5.17	-0.05	1.83	0.51	-2.08	0.70	-4.30	0.85	0.84	07/31/24
(m)	MFS® Pennsylvania Municipal Bond Fund	02/01/93	(N/A)	MFPAX	4.25	2.71	1.56	-0.74	4.98	0.02	2.27	0.68	-2.16	0.52	-4.23	0.93	0.69	07/31/24
(m)	MFS® South Carolina Municipal Bond Fund	10/31/84	(N/A)	MFSCX	4.25	2.15	1.12	-0.94	5.43	-0.04	1.70	0.25	-2.36	0.95	-4.29	0.88	0.84	07/31/24
(m)	MFS® Virginia Municipal Bond Fund	10/31/84	(N/A)	MSVAX	4.25	2.28	1.35	-0.80	5.23	-0.18	1.84	0.47	-2.23	0.76	-4.43	0.87	0.81	07/31/24
(m)	MFS® West Virginia Municipal Bond Fund	10/31/84	(N/A)	MFVWX	4.25	2.26	1.41	-0.49	5.13	-0.09	1.82	0.53	-1.92	0.66	-4.33	1.00	0.87	07/31/24

\* Periods less than one year are actual not annualized.

\*\* A small portion of income may be subject to state, federal, and/or alternative minimum tax. Capital gains, if any, are subject to a capital gains tax.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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Class A shares ("A") results include the maximum sales charge.

As of February 29, 2024



# Class A MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
STOCK FUNDS																
Massachusetts Investors Growth Stock Fund	01/01/35	(N/A)	MIGFX	11.53	-0.04	6.16	28.69	0.77	39.91	22.43	26.20	-19.24	24.08	0.71	0.71	—
Massachusetts Investors Trust	07/15/24	(N/A)	MITTX	10.99	0.28	8.77	23.56	-5.31	31.91	14.12	26.82	-16.34	19.15	0.70	0.70	—
MFS® Blended Research® Core Equity Fund	08/07/97	(N/A)	MUEAX	11.84	0.66	8.12	20.34	-8.05	28.44	15.10	29.03	-16.25	27.96	0.81	0.74	01/31/25
MFS® Blended Research® Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWAX	—	—	6.38	26.56	-5.11	32.01	30.47	28.64	-29.97	40.78	0.86	0.74	09/30/24
MFS® Blended Research® Mid Cap Equity Fund	08/19/16	(N/A)	BMSFX	—	—	—	18.81	-11.41	29.97	10.10	26.43	-13.93	19.41	0.94	0.84	09/30/24
MFS® Blended Research® Small Cap Equity Fund	09/15/15	(N/A)	BRSDX	—	—	20.01	13.52	-5.67	25.92	1.85	28.74	-18.63	18.49	1.13	0.99	09/30/24
MFS® Blended Research® Value Equity Fund	09/15/15	(N/A)	BRUDX	—	—	13.85	16.36	-8.58	23.00	1.44	25.90	-4.37	14.26	0.85	0.74	09/30/24
MFS® Core Equity Fund <sup>F1</sup>	01/02/96	(N/A)	MRGAX	11.11	-0.37	11.09	24.46	-4.11	32.73	18.55	25.08	-17.19	22.86	0.92	0.91	12/31/24
MFS® Equity Income Fund	09/27/12	(N/A)	EQNAX	8.98	-1.08	10.40	19.64	-7.73	25.44	8.32	25.97	-7.12	15.92	0.96	0.89	11/30/24
MFS® Growth Fund	09/13/93	(N/A)	MFEGX	8.52	7.11	2.21	30.54	2.34	37.35	31.30	23.34	-31.32	35.79	0.85	0.84	03/31/24
MFS® Intrinsic Value Fund	02/08/22	(N/A)	UIVXX	—	—	—	—	—	—	—	—	—	24.62	8.15	0.94	11/30/24
MFS® Low Volatility Equity Fund	12/05/13	(N/A)	MLVAX	12.54	4.45	9.77	16.53	-1.41	26.83	11.33	25.16	-10.86	12.12	0.93	0.89	12/31/24
MFS® Mid Cap Growth Fund	12/01/93	(N/A)	OTCAX	8.61	4.21	4.33	25.99	0.85	37.43	35.33	13.74	-28.53	21.00	1.05	1.04	12/31/24
MFS® Mid Cap Value Fund	08/31/01	(N/A)	MVCAX	9.91	-2.52	15.38	13.38	-11.66	30.54	4.03	30.50	-8.97	12.51	1.00	0.99	01/31/25
MFS® New Discovery Fund	01/02/97	(N/A)	MNDAX	-7.52	-2.13	8.59	26.08	-1.65	40.78	44.63	1.26	-29.81	13.98	1.30	1.29	12/31/24
MFS® New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVAX	2.91	-3.12	26.13	14.65	-11.34	33.27	3.40	33.45	-11.07	10.94	1.20	1.19	06/30/24
MFS® Research Fund	10/13/71	(N/A)	MFRFX	10.18	0.85	8.73	23.35	-4.49	33.10	16.63	24.71	-17.26	22.46	0.80	0.80	—
MFS® Technology Fund	01/02/97	(N/A)	MTCAX	10.33	10.37	8.16	38.47	1.59	35.76	46.04	13.37	-36.20	53.89	1.15	1.14	12/31/24
MFS® Total Return Fund	10/06/70	(N/A)	MSFRX	8.34	-0.38	8.87	12.16	-5.78	20.20	9.71	13.98	-9.66	10.31	0.73	0.73	—
MFS® Utilities Fund	02/14/92	(N/A)	MMUFX	12.58	-14.77	11.40	14.68	0.85	24.89	6.02	13.85	0.44	-2.25	1.03	1.02	02/28/25
MFS® Value Fund	01/02/96	(N/A)	MEIAX	10.29	-0.79	13.86	17.45	-10.07	29.74	3.66	25.08	-6.13	7.89	0.80	0.79	12/31/24

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of February 29, 2024



# Class A MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
ASSET ALLOCATION STRATEGIES																
MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MAAGX	3.66	-0.14	7.24	22.92	-6.97	29.67	15.48	18.89	-17.09	15.98	1.03	1.02	09/30/24
MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACFX	3.94	-0.78	5.42	10.78	-3.10	17.09	11.59	7.85	-13.48	10.44	0.84	0.84	—
MFS® Diversified Income Fund <sup>2</sup>	05/26/06	(N/A)	DIFAX	9.69	-2.18	8.49	8.64	-3.69	17.38	2.15	9.30	-13.01	9.23	0.95	0.89	06/30/24
MFS® Global Alternative Strategy Fund <sup>3</sup>	12/20/07	(N/A)	DVRAX	2.36	-1.87	-3.73	6.18	-0.71	12.81	4.42	3.43	-5.46	8.95	1.57	1.37	02/28/25
MFS® Growth Allocation Fund	06/28/02	(N/A)	MAGWX	3.74	-0.87	7.56	18.90	-5.87	26.26	14.46	15.70	-16.08	14.61	0.97	0.96	09/30/24
MFS® Lifetime® 2025 Fund	11/02/12	(N/A)	LTTAX	4.10	-0.71	7.28	13.06	-4.24	17.53	10.37	8.28	-12.55	10.14	0.96	0.72	08/31/24
MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTAX	3.84	-0.72	8.60	16.91	-5.96	21.73	11.62	12.45	-13.99	12.16	0.96	0.76	08/31/24
MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFEAX	3.77	-0.42	8.87	19.13	-7.28	24.76	12.61	16.89	-15.02	14.55	1.03	0.80	08/31/24
MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFAX	3.75	-0.13	8.73	20.47	-7.82	25.86	12.88	18.59	-15.48	16.01	1.03	0.82	08/31/24
MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMAX	3.79	-0.18	8.81	20.87	-8.12	26.44	13.01	19.92	-15.70	16.32	1.08	0.83	08/31/24
MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFSX	3.70	-0.14	8.80	20.86	-8.12	26.49	13.01	20.11	-15.87	16.55	1.08	0.83	08/31/24
MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFIAX	3.76	-0.20	8.74	20.93	-8.21	26.47	13.05	20.13	-15.82	16.51	1.14	0.83	08/31/24
MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJAX	—	—	—	20.92	-8.16	26.58	13.23	20.10	-15.97	16.51	1.29	0.84	08/31/24
MFS® Lifetime® 2065 Fund	09/01/21	(N/A)	LFTFX	—	—	—	—	—	—	—	—	-16.13	16.58	8.95	0.84	08/31/24
MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLAX	3.61	-0.68	5.03	8.05	-2.64	13.52	9.87	6.29	-11.76	9.34	0.89	0.70	08/31/24
MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWAX	—	1.10	-1.16	6.67	1.95	8.67	2.85	1.13	-2.33	5.18	1.52	1.42	09/30/24
MFS® Moderate Allocation Fund	06/28/02	(N/A)	MAMAX	4.04	-0.91	6.47	14.81	-4.46	21.73	13.61	11.70	-15.20	12.49	0.90	0.90	—
MFS® Prudent Investor Fund	01/18/18	(N/A)	FPPAX	—	—	—	—	—	13.89	11.03	1.54	-13.99	15.15	1.89	1.24	10/31/24

<sup>2</sup> Performance information prior to June 15, 2021 reflects time periods when the fund did not have an investment strategy of allocating a portion of its assets to investment grade quality debt instruments. The fund's investment strategies changed effective June 15, 2021.

<sup>3</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of February 29, 2024



# Class A MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
GLOBAL/INTERNATIONAL FUNDS																
MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKAX	—	—	14.43	38.74	-16.66	18.75	9.73	3.42	-19.26	9.56	2.45	1.24	12/31/24
MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXAX	—	—	1.32	26.84	-15.78	21.78	8.88	13.23	-13.59	14.01	0.96	0.89	12/31/24
MFS® Emerging Markets Equity Fund	10/24/95	(N/A)	MEMAX	-6.85	-12.91	8.60	37.38	-14.02	19.78	10.17	-6.98	-20.11	10.88	1.38	1.31	09/30/24
MFS® Emerging Markets Equity Research Fund	02/23/21	(N/A)	EEMPX	—	—	—	—	—	—	—	—	-22.47	8.91	11.57	1.31	11/30/24
MFS® Global Equity Fund	09/07/93	(N/A)	MWEFX	3.75	-1.68	7.07	23.62	-9.82	30.22	13.87	17.04	-17.95	14.21	1.21	1.20	02/28/25
MFS® Global Growth Fund	11/18/93	(N/A)	MWOFX	4.03	-2.01	5.08	31.38	-4.94	35.35	20.23	18.36	-19.30	20.60	1.33	1.22	02/28/25
MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNAX	-6.24	2.19	6.59	29.42	-8.56	30.27	23.59	11.86	-27.07	18.15	1.78	1.35	12/31/24
MFS® Global Real Estate Fund	03/11/09	(N/A)	MGLAX	14.96	0.40	7.23	12.64	-3.92	26.04	1.88	29.47	-27.20	10.92	1.20	1.19	12/31/24
MFS® Global Total Return Fund	09/04/90	(N/A)	MFWTX	3.48	-1.55	5.28	15.14	-7.18	18.24	9.30	8.27	-10.82	10.26	1.21	1.11	02/28/25
MFS® International Diversification Fund	09/30/04	(N/A)	MDIDX	-4.08	-0.12	2.16	29.94	-11.24	25.68	14.97	7.41	-17.30	14.02	1.09	1.08	09/30/24
MFS® International Equity Fund <sup>A1</sup>	02/08/23	01/31/96 (R6)	MIEJX	-4.46	-0.24	0.05	27.69	-10.89	28.07	10.81	15.16	-14.83	18.67	1.02	1.01	10/31/24
MFS® International Growth Fund	10/24/95	(N/A)	MGRAX	-5.32	0.02	2.39	32.17	-9.08	26.82	15.45	9.23	-15.32	14.52	1.09	1.08	09/30/24
MFS® International Intrinsic Value Fund <sup>S2</sup>	10/24/95	(N/A)	MGIAX	1.28	6.48	3.93	26.83	-9.22	25.56	20.15	10.29	-23.26	17.64	1.04	1.03	09/30/24
MFS® International Large Cap Value Fund	06/30/20	(N/A)	MKVBX	—	—	—	—	—	—	—	14.44	-9.14	15.93	1.07	0.96	09/30/24
MFS® International New Discovery Fund <sup>S3</sup>	10/09/97	(N/A)	MIDAX	-2.90	2.48	0.22	31.75	-10.66	22.52	9.71	4.67	-18.81	12.78	1.32	1.31	01/31/25
MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGAX	9.85	1.11	5.72	18.15	-2.61	20.32	5.11	16.62	-8.41	13.43	1.02	0.99	12/31/24
MFS® Research International Fund	01/02/97	(N/A)	MRSAX	-6.97	-2.02	-1.10	28.05	-14.21	27.67	12.90	11.60	-17.51	13.10	1.05	1.04	12/31/24

<sup>A1</sup> Performance for Class A shares for periods prior to their offering is derived from the performance of the fund's Class R6 shares, adjusted to take into account differences in sales loads and class-specific operating expenses, such as Rule 12b-1 fees and certain shareholder servicing (including sub-accounting) costs, if any. In addition, the performance shown for Class A shares for periods prior to their offering does not reflect any applicable fee reductions and waivers and expense reimbursements that were in effect prior to the offering of Class A shares. Please see the prospectus for additional information about performance and expenses.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.



As of February 29, 2024



# Class A MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
BOND FUNDS																
MFS® Core Bond Fund	06/22/22	(N/A)	MCBEX	—	—	—	—	—	—	—	—	—	6.07	1.46	0.64	08/31/24
MFS® Corporate Bond Fund	05/08/74	(N/A)	MFBFX	5.69	-0.36	5.81	6.06	-3.20	14.41	10.99	-1.48	-16.61	8.84	0.78	0.77	08/31/24
MFS® Emerging Markets Debt Fund	03/17/98	(N/A)	MEDAX	4.37	-0.77	9.21	9.33	-5.22	13.78	7.73	-2.65	-15.04	10.19	1.07	1.06	11/30/24
MFS® Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLAX	-4.30	-16.63	9.49	14.44	-6.37	15.76	2.44	-8.30	-8.98	13.22	1.25	1.11	02/28/25
MFS® Global High Yield Fund	07/01/98	(N/A)	MHOAX	2.48	-4.03	12.92	7.10	-3.10	13.99	4.04	2.71	-10.03	12.42	1.21	1.06	05/31/24
MFS® Global Opportunistic Bond Fund <sup>4,5</sup>	06/02/10	(N/A)	MGBAX	-1.10	-4.57	2.33	7.58	-2.39	8.13	10.71	-3.21	-11.12	8.35	0.95	0.94	03/31/24
MFS® Government Securities Fund <sup>P1</sup>	07/25/84	(N/A)	MFGSX	4.63	0.27	0.52	1.91	0.27	6.19	6.24	-2.18	-12.22	3.83	0.77	0.76	06/30/24
MFS® High Income Fund	02/17/78	(N/A)	MHITX	2.20	-3.82	13.38	6.13	-3.30	14.43	4.42	3.20	-10.56	12.18	0.89	0.88	05/31/24
MFS® Income Fund <sup>P1,6</sup>	10/29/87	(N/A)	MFIQX	2.98	-2.07	7.84	5.68	-2.39	11.33	9.45	-0.30	-13.57	7.44	0.90	0.73	02/28/25
MFS® Inflation-Adjusted Bond Fund	09/30/03	(N/A)	MIAAX	2.74	-2.35	3.98	2.41	-1.97	7.99	10.25	4.50	-11.91	2.14	0.82	0.64	02/28/25
MFS® Limited Maturity Fund	02/26/92	(N/A)	MQLFX	0.75	0.13	1.44	1.29	1.17	4.72	4.14	-0.25	-4.27	5.94	0.73	0.57	08/31/24
MFS® Municipal High Income Fund	02/24/84	(N/A)	MMHYX	14.74	5.03	1.81	7.64	2.08	9.60	3.38	5.30	-13.84	6.14	0.66	0.61	05/31/24
MFS® Municipal Income Fund	09/07/93	(N/A)	MFIAX	10.85	3.33	0.99	5.89	1.00	8.14	4.05	3.00	-11.08	6.72	0.77	0.76	07/31/24
MFS® Municipal Intermediate Fund	05/18/21	(N/A)	MIUAX	—	—	—	—	—	—	—	—	-7.41	5.85	0.93	0.70	07/31/24
MFS® Municipal Limited Maturity Fund	03/17/92	(N/A)	MTLFX	3.12	1.75	0.05	3.22	1.28	5.31	3.26	0.71	-5.28	4.35	0.72	0.59	08/31/24
MFS® Total Return Bond Fund	01/04/99	(N/A)	MRBFX	5.68	-0.53	3.54	4.08	-1.28	9.89	8.68	-1.06	-13.96	7.06	0.78	0.60	08/31/24

<sup>4</sup> Performance information prior to December 1, 2014, reflects time periods when the fund had (i) a policy of focusing its investments on debt instruments of U.S. and foreign governments and (ii) a policy permitting the fund to invest up to 100% of its assets in less than investment grade quality debt instruments (lower quality debt instruments). The fund's investment policies and strategies changed effective December 1, 2014.

<sup>5</sup> Performance information prior to April 30, 2021, reflects time periods when the fund (i) had a policy of primarily investing in investment grade quality debt instruments and (ii) did not have a policy to engage in a currency hedging strategy to primarily expose the fund to the U.S. dollar. The fund's investment policies and strategies changed effective April 30, 2021.

<sup>6</sup> Performance information prior to December 2, 2019 reflects time periods when the fund had (i) a policy permitting the fund to invest up to 100% of its assets in below investment grade quality debt instruments and (ii) a policy permitting the fund to invest in equity securities as a principal investment strategy. The fund's investment policies and strategies changed effective December 2, 2019.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>P1</sup> A portion of the fund's distributions may include a return of capital for shareholders. Distributions that are treated for federal income tax purposes as a return of capital will reduce a shareholder's tax basis in his or her shares and, to the extent the distribution exceeds a shareholder's adjusted tax basis, will be treated as a gain to the shareholder from a sale of shares.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.

As of February 29, 2024



## Class A MFS<sup>®</sup> Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
STATE TAX-ADVANTAGED BOND FUNDS**																
MFS® Alabama Municipal Bond Fund	02/01/90	(N/A)	MFALX	9.94	3.06	0.24	4.47	1.03	7.02	4.04	1.86	-10.77	6.42	1.05	0.90	07/31/24
MFS® Arkansas Municipal Bond Fund	02/03/92	(N/A)	MFARX	9.47	3.05	0.00	4.09	1.23	6.19	4.24	2.38	-9.28	5.85	0.93	0.70	07/31/24
MFS® California Municipal Bond Fund	06/18/85	(N/A)	MCCTX	12.11	4.56	0.95	6.14	0.94	8.33	4.00	2.93	-11.63	6.97	0.86	0.70	07/31/24
MFS® Georgia Municipal Bond Fund	06/06/88	(N/A)	MMGAX	10.24	2.72	0.27	4.32	0.77	6.94	3.49	2.01	-10.25	6.41	0.96	0.90	07/31/24
MFS® Maryland Municipal Bond Fund	10/31/84	(N/A)	MFSMX	9.04	2.81	0.63	4.39	1.28	6.40	3.97	2.55	-9.94	6.53	0.98	0.83	07/31/24
MFS® Massachusetts Municipal Bond Fund	04/09/85	(N/A)	MFSXX	10.68	3.11	0.38	4.85	0.76	7.31	3.68	2.02	-10.26	6.14	0.86	0.82	07/31/24
MFS® Mississippi Municipal Bond Fund	08/06/92	(N/A)	MISSX	9.41	3.22	-0.03	4.06	1.03	6.56	4.23	1.95	-9.82	4.92	1.01	0.85	07/31/24
MFS® New York Municipal Bond Fund	06/06/88	(N/A)	MSNYX	11.05	3.61	0.35	5.56	0.58	7.72	3.80	2.96	-12.33	7.33	0.91	0.83	07/31/24
MFS® North Carolina Municipal Bond Fund	10/31/84	(N/A)	MSNCX	9.57	3.05	0.21	4.35	0.69	6.84	3.80	2.16	-9.74	5.88	0.85	0.84	07/31/24
MFS® Pennsylvania Municipal Bond Fund	02/01/93	(N/A)	MFPAX	10.75	3.61	1.09	5.15	1.43	7.40	4.54	2.64	-10.21	5.49	0.93	0.69	07/31/24
MFS® South Carolina Municipal Bond Fund	10/31/84	(N/A)	MFSCX	9.78	3.15	-0.11	4.33	1.02	6.52	4.04	1.77	-10.65	6.14	0.88	0.84	07/31/24
MFS® Virginia Municipal Bond Fund	10/31/84	(N/A)	MSVAX	9.56	3.30	0.49	4.01	1.23	6.83	4.39	1.82	-9.88	5.88	0.87	0.81	07/31/24
MFS® West Virginia Municipal Bond Fund	10/31/84	(N/A)	MFVWX	9.91	2.85	0.27	3.98	1.01	6.25	4.06	2.04	-9.36	6.01	1.00	0.87	07/31/24

\*\* A small portion of income may be subject to state, federal, and/or alternative minimum tax. Capital gains, if any, are subject to a capital gains tax.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

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As of February 29, 2024



## Class B MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable <div>Ⓐ Annually</div> <div>Ⓢ Semiannually</div> <div>Ⓖ Quarterly</div> <div>Ⓜ Monthly</div>					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
STOCK FUNDS																		
Ⓐ	Massachusetts Investors Growth Stock Fund	09/07/93	(N/A)	MIGBX	4.00	12.41	14.20	9.23	27.29	5.63	12.41	13.97	8.38	23.29	1.63	1.46	1.46	—
Ⓐ	Massachusetts Investors Trust	09/07/93	(N/A)	MITBX	4.00	10.17	11.80	8.97	25.40	6.73	10.17	11.54	8.13	21.40	2.73	1.45	1.45	—
Ⓐ	MFS® Blended Research® Core Equity Fund	08/11/97	(N/A)	MUSBX	4.00	10.62	13.81	12.54	32.60	8.27	10.62	13.57	11.74	28.60	4.27	1.56	1.49	01/31/25
Ⓐ	MFS® Blended Research® Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWBX	4.00	13.59	15.58	10.76	44.81	10.12	13.59	15.36	9.94	40.81	6.12	1.61	1.49	09/30/24
Ⓐ	MFS® Blended Research® Mid Cap Equity Fund	08/19/16	(N/A)	BMSBX	4.00	9.87	10.63	8.91	16.88	5.47	9.87	10.36	8.06	12.88	1.47	1.69	1.59	09/30/24
Ⓐ	MFS® Blended Research® Small Cap Equity Fund	09/15/15	(N/A)	BRSBX	4.00	8.00	5.41	2.95	10.69	1.18	8.00	5.08	2.08	6.69	-2.82	1.88	1.74	09/30/24
Ⓐ	MFS® Blended Research® Value Equity Fund	09/15/15	(N/A)	BRUEX	4.00	9.21	9.22	10.30	16.69	4.82	9.21	8.94	9.47	12.69	0.82	1.60	1.49	09/30/24
Ⓐ	MFS® Core Equity Fund <sup>F1</sup>	01/02/97	(N/A)	MRGBX	4.00	11.04	12.81	9.32	26.43	6.69	11.04	12.56	8.48	22.43	2.69	1.67	1.66	12/31/24
Ⓖ	MFS® Equity Income Fund	09/27/12	(N/A)	EQNBX	4.00	8.71	10.37	9.70	16.29	3.54	8.71	10.10	8.87	12.29	-0.46	1.71	1.64	11/30/24
Ⓐ	MFS® Growth Fund	12/29/86	(N/A)	MEGBX	4.00	12.86	14.73	8.63	46.89	13.06	12.86	14.50	7.78	42.89	9.06	1.60	1.59	03/31/24
Ⓖ	MFS® Low Volatility Equity Fund	12/05/13	(N/A)	MLVBX	4.00	9.86	10.41	9.43	17.92	6.03	9.86	10.14	8.59	13.92	2.03	1.68	1.64	12/31/24
Ⓐ	MFS® Mid Cap Growth Fund	12/01/93	(N/A)	OTCBX	4.00	10.37	10.64	2.17	25.04	8.59	10.37	10.37	1.20	21.04	4.59	1.80	1.79	12/31/24
Ⓐ	MFS® Mid Cap Value Fund	11/01/01	(N/A)	MCBVX	4.00	7.80	9.60	8.40	10.99	3.46	7.80	9.32	7.55	6.99	-0.54	1.75	1.74	01/31/25
Ⓐ	MFS® New Discovery Fund	11/03/97	(N/A)	MNDBX	4.00	7.04	6.63	-7.04	9.44	4.40	7.04	6.39	-7.71	5.44	0.40	2.05	2.04	12/31/24
Ⓐ	MFS® New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVBX	4.00	7.82	8.19	4.64	1.21	-1.41	7.82	7.89	3.80	-2.61	-5.35	1.95	1.94	06/30/24
Ⓐ	MFS® Research Fund	09/07/93	(N/A)	MFRBX	4.00	10.54	12.40	9.39	27.80	6.79	10.54	12.15	8.55	23.80	2.79	1.55	1.55	—
Ⓐ	MFS® Technology Fund	04/14/00	(N/A)	MTCBX	4.00	15.29	15.73	6.82	60.83	13.40	15.29	15.51	6.12	56.83	9.40	1.90	1.89	12/31/24
Ⓜ	MFS® Total Return Fund	08/23/93	(N/A)	MTRBX	4.00	5.58	6.26	3.41	9.32	0.88	5.58	5.94	2.53	5.32	-3.12	1.48	1.48	—
Ⓖ	MFS® Utilities Fund	09/07/93	(N/A)	MMUBX	4.00	4.49	4.41	3.41	-3.95	-5.81	4.49	4.09	2.53	-7.61	-9.58	1.78	1.77	02/28/25
Ⓖ	MFS® Value Fund	11/04/97	(N/A)	MFEBX	4.00	8.03	8.83	8.14	12.77	3.94	8.03	8.55	7.28	8.77	-0.06	1.55	1.54	12/31/24

Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.

\* Periods less than one year are actual not annualized.

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.

Class B shares ("B") results include the applicable contingent deferred sales charge (CDSC), which declines over six years from 4% to 0%. The elimination of the charge begins six years after the end of the month in which shares were initially purchased.

As of February 29, 2024



## Class B MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable Ⓐ Annually Ⓔ Semiannually Ⓖ Quarterly Ⓜ Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>						
					Not Including Sales Charges					Including Sales Charges											
Ⓐ	Ⓔ	Ⓖ	Ⓜ	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
ASSET ALLOCATION STRATEGIES																					
Ⓐ	MFS® Aggressive Growth Allocation Fund				06/28/02	(N/A)	MBAGX	4.00	7.53	8.85	4.76	16.18	3.85	7.53	8.56	3.84	12.18	-0.15	1.78	1.77	09/30/24
Ⓖ	MFS® Conservative Allocation Fund				06/28/02	(N/A)	MACBX	4.00	3.79	4.36	0.80	9.06	1.10	3.79	4.02	-0.14	5.06	-2.90	1.59	1.59	—
Ⓐ	MFS® Global Alternative Strategy Fund <sup>2</sup>				12/20/07	(N/A)	DVRBX	4.00	2.06	3.72	3.41	10.69	3.86	2.06	3.37	2.47	6.69	-0.14	2.32	2.12	02/28/25
Ⓐ	MFS® Growth Allocation Fund				06/28/02	(N/A)	MBGWX	4.00	6.50	7.67	3.74	14.44	3.16	6.50	7.37	2.81	10.44	-0.84	1.72	1.71	09/30/24
Ⓐ	MFS® Lifetime® 2025 Fund				11/02/12	(N/A)	LTTBX	4.00	4.08	4.25	0.92	8.13	0.69	4.08	3.91	0.02	4.13	-3.31	1.71	1.47	08/31/24
Ⓐ	MFS® Lifetime® 2030 Fund				09/29/05	(N/A)	MLTBX	4.00	5.34	5.75	2.28	10.47	1.49	5.34	5.43	1.40	6.47	-2.51	1.71	1.51	08/31/24
Ⓐ	MFS® Lifetime® 2035 Fund				11/02/12	(N/A)	LFEBX	4.00	6.42	7.40	3.93	13.23	2.47	6.42	7.10	3.02	9.23	-1.53	1.78	1.55	08/31/24
Ⓐ	MFS® Lifetime® 2040 Fund				09/29/05	(N/A)	MLFBX	4.00	6.91	8.14	4.84	15.11	3.21	6.91	7.85	3.93	11.11	-0.79	1.78	1.57	08/31/24
Ⓐ	MFS® Lifetime® 2045 Fund				11/02/12	(N/A)	LTMBX	4.00	7.12	8.51	5.22	15.53	3.48	7.12	8.22	4.31	11.53	-0.52	1.83	1.58	08/31/24
Ⓐ	MFS® Lifetime® 2050 Fund				09/15/10	(N/A)	MFFRX	4.00	7.16	8.58	5.32	15.82	3.63	7.16	8.29	4.41	11.82	-0.37	1.83	1.58	08/31/24
Ⓐ	MFS® Lifetime® 2055 Fund				11/02/12	(N/A)	LFIBX	4.00	7.16	8.58	5.33	15.85	3.57	7.16	8.29	4.42	11.85	-0.43	1.89	1.58	08/31/24
Ⓐ	MFS® Lifetime® 2060 Fund				12/06/16	(N/A)	MFJBX	4.00	8.97	8.61	5.30	15.91	3.63	8.97	8.32	4.39	11.91	-0.37	2.04	1.59	08/31/24
Ⓜ	MFS® Lifetime® Income Fund				09/29/05	(N/A)	MLLBX	4.00	2.94	3.43	0.34	7.30	0.50	2.94	3.08	-0.56	3.30	-3.50	1.64	1.45	08/31/24
Ⓐ	MFS® Managed Wealth Fund				06/27/14	(N/A)	MNWBX	4.00	1.94	2.20	2.15	8.29	3.01	1.94	1.83	1.19	4.29	-0.99	2.27	2.17	09/30/24
Ⓖ	MFS® Moderate Allocation Fund				06/28/02	(N/A)	MMABX	4.00	5.15	6.02	2.11	11.67	2.08	5.15	5.70	1.19	7.67	-1.92	1.65	1.65	—
Ⓐ	MFS® Prudent Investor Fund				01/18/18	(N/A)	FPPDX	4.00	2.65	2.82	-0.05	10.10	-1.58	2.65	2.46	-1.03	6.10	-5.52	2.64	1.99	10/31/24

Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.

\* Periods less than one year are actual not annualized.

<sup>2</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

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Class B shares ("B") results include the applicable contingent deferred sales charge (CDSC), which declines over six years from 4% to 0%. The elimination of the charge begins six years after the end of the month in which shares were initially purchased.

As of February 29, 2024



## Class B MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable Ⓐ Annually Ⓔ Semiannually Ⓔ Quarterly Ⓜ Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
GLOBAL/INTERNATIONAL FUNDS																		
Ⓐ	MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKBX	4.00	4.78	1.29	-4.84	8.04	1.71	4.78	0.91	-5.74	4.04	-2.29	3.20	1.99	12/31/24
Ⓐ	MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXBX	4.00	4.98	5.64	2.46	10.11	1.50	4.98	5.32	1.52	6.11	-2.50	1.71	1.64	12/31/24
Ⓐ	MFS® Emerging Markets Equity Fund	10/24/95	(N/A)	MEMBX	4.00	0.95	-1.14	-8.09	6.30	-0.83	0.95	-1.52	-8.99	2.30	-4.79	2.13	2.06	09/30/24
Ⓐ	MFS® Global Equity Fund	12/29/86	(N/A)	MWEBX	4.00	6.42	7.39	3.26	11.09	2.26	6.42	7.08	2.43	7.09	-1.74	1.96	1.95	02/28/25
Ⓐ	MFS® Global Growth Fund	11/18/93	(N/A)	MWOBX	4.00	9.24	10.90	5.22	20.47	4.12	9.24	10.64	4.31	16.47	0.12	2.08	1.97	02/28/25
Ⓐ	MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNBX	4.00	5.93	5.88	-0.56	11.76	1.13	5.93	5.56	-1.50	7.76	-2.87	2.53	2.10	12/31/24
Ⓐ	MFS® Global Real Estate Fund <sup>B1</sup>	12/19/14	03/11/09 (I)	MGLDX	4.00	4.60	2.41	-1.16	2.14	-3.81	4.60	2.04	-2.09	-1.86	-7.66	1.95	1.94	12/31/24
Ⓔ	MFS® Global Total Return Fund	09/07/93	(N/A)	MFWBX	4.00	3.70	4.39	1.28	7.65	-0.34	3.70	4.06	0.39	3.65	-4.33	1.96	1.86	02/28/25
Ⓐ	MFS® International Diversification Fund	09/30/04	(N/A)	MDIFX	4.00	4.47	5.28	0.03	9.42	0.64	4.47	4.96	-0.92	5.42	-3.36	1.84	1.83	09/30/24
Ⓐ	MFS® International Growth Fund	10/24/95	(N/A)	MGRBX	4.00	5.65	6.93	2.54	12.56	2.61	5.65	6.63	1.60	8.56	-1.39	1.84	1.83	09/30/24
Ⓐ	MFS® International Intrinsic Value Fund <sup>S2</sup>	10/24/95	(N/A)	MGIBX	4.00	6.07	6.25	1.15	13.06	1.81	6.07	5.96	0.40	9.06	-2.19	1.79	1.78	09/30/24
Ⓐ	MFS® International New Discovery Fund <sup>S3</sup>	10/02/00	(N/A)	MIDBX	4.00	3.27	2.43	-1.75	6.97	-1.33	3.27	2.08	-2.63	2.97	-5.28	2.07	2.06	01/31/25
Ⓔ	MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGBX	4.00	6.83	7.13	7.58	15.74	3.32	6.83	6.82	6.71	11.74	-0.68	1.77	1.74	12/31/24
Ⓐ	MFS® Research International Fund	01/02/98	(N/A)	MRIBX	4.00	3.41	5.72	1.10	9.38	1.16	3.41	5.39	0.12	5.38	-2.84	1.80	1.79	12/31/24

Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.

\* Periods less than one year are actual not annualized.

<sup>B1</sup> Performance for Class B shares includes the performance of the fund's Class I shares, adjusted to take into account differences in sales loads and class-specific operating expenses (such as Rule 12b-1 fees), if any, for periods prior to their offering. Please see the prospectus for additional information about performance and expenses.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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Class B shares ("B") results include the applicable contingent deferred sales charge (CDSC), which declines over six years from 4% to 0%. The elimination of the charge begins six years after the end of the month in which shares were initially purchased.

As of February 29, 2024



## Class B MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly  Class B Inception Date Comparable Share Class Inception Date Symbol Max Sales Charge (%)					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
BOND FUNDS																		
(m)	MFS <sup>®</sup> Corporate Bond Fund	09/07/93	(N/A)	MFBBX	4.00	1.50	0.96	-3.67	5.30	-1.43	1.50	0.62	-4.55	1.30	-5.35	1.53	1.52	08/31/24
(m)	MFS <sup>®</sup> Emerging Markets Debt Fund	05/31/02	(N/A)	MEDBX	4.00	1.82	0.58	-2.82	8.34	0.25	1.82	0.25	-3.67	4.34	-3.72	1.82	1.81	11/30/24
(m)	MFS <sup>®</sup> Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLBX	4.00	-0.49	0.07	-2.15	8.40	-2.75	-0.49	-0.26	-3.03	4.40	-6.62	2.00	1.86	02/28/25
(m)	MFS <sup>®</sup> Global High Yield Fund	07/01/98	(N/A)	MHOBX	4.00	2.64	2.53	0.75	10.21	0.76	2.64	2.20	-0.11	6.21	-3.24	1.96	1.81	05/31/24
(m)	MFS <sup>®</sup> Global Opportunistic Bond Fund <sup>3,4</sup>	06/02/10	(N/A)	MGBBX	4.00	0.23	0.92	-2.54	4.35	-1.41	0.23	0.56	-3.44	0.35	-5.34	1.70	1.69	03/31/24
(m)	MFS <sup>®</sup> Government Securities Fund <sup>P1</sup>	08/30/93	(N/A)	MFGBX	4.00	-0.30	-1.11	-4.42	0.75	-1.96	-0.30	-1.49	-5.35	-3.18	-5.86	1.52	1.51	06/30/24
(m)	MFS <sup>®</sup> High Income Fund	09/27/93	(N/A)	MHIBX	4.00	2.55	2.39	0.48	9.21	-0.12	2.55	2.06	-0.41	5.21	-4.08	1.64	1.63	05/31/24
(m)	MFS <sup>®</sup> Income Fund <sup>P1,5</sup>	09/07/93	(N/A)	MIOBX	4.00	1.30	0.94	-3.04	4.22	-1.18	1.30	0.58	-3.94	0.22	-5.10	1.65	1.48	02/28/25
(q)	MFS <sup>®</sup> Inflation-Adjusted Bond Fund	09/01/04	(N/A)	MIABX	4.00	0.53	1.08	-2.46	0.03	-1.00	0.53	0.73	-3.32	-3.85	-4.96	1.57	1.39	02/28/25
(m)	MFS <sup>®</sup> Limited Maturity Fund	09/07/93	(N/A)	MQLBX	4.00	0.68	1.07	-0.30	4.67	0.01	0.68	0.69	-1.26	0.67	-3.97	1.48	1.32	08/31/24
(m)	MFS <sup>®</sup> Municipal High Income Fund	09/07/93	(N/A)	MMHBX	4.00	2.80	0.90	-1.94	5.40	0.75	2.80	0.55	-2.84	1.40	-3.25	1.66	1.36	05/31/24
(m)	MFS <sup>®</sup> Municipal Income Fund	12/29/86	(N/A)	MMIBX	4.00	2.04	0.94	-1.33	5.24	0.09	2.04	0.57	-2.27	1.24	-3.90	1.52	1.51	07/31/24
(m)	MFS <sup>®</sup> Municipal Limited Maturity Fund	09/07/93	(N/A)	MTLBX	4.00	0.87	0.67	-0.67	3.72	0.21	0.87	0.28	-1.64	-0.28	-3.79	1.47	1.34	08/31/24
(m)	MFS <sup>®</sup> Total Return Bond Fund	12/29/00	(N/A)	MRBBX	4.00	0.89	0.36	-3.48	3.75	-1.33	0.89	0.00	-4.38	-0.25	-5.26	1.53	1.35	08/31/24

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\* Periods less than one year are actual not annualized.

<sup>3</sup> Performance information prior to December 1, 2014, reflects time periods when the fund had (i) a policy of focusing its investments on debt instruments of U.S. and foreign governments and (ii) a policy permitting the fund to invest up to 100% of its assets in less than investment grade quality debt instruments (lower quality debt instruments). The fund's investment policies and strategies changed effective December 1, 2014.

<sup>4</sup> Performance information prior to April 30, 2021, reflects time periods when the fund (i) had a policy of primarily investing in investment grade quality debt instruments and (ii) did not have a policy to engage in a currency hedging strategy to primarily expose the fund to the U.S. dollar. The fund's investment policies and strategies changed effective April 30, 2021.

<sup>5</sup> Performance information prior to December 2, 2019 reflects time periods when the fund had (i) a policy permitting the fund to invest up to 100% of its assets in below investment grade quality debt instruments and (ii) a policy permitting the fund to invest in equity securities as a principal investment strategy. The fund's investment policies and strategies changed effective December 2, 2019.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>P1</sup> A portion of the fund's distributions may include a return of capital for shareholders. Distributions that are treated for federal income tax purposes as a return of capital will reduce a shareholder's tax basis in his or her shares and, to the extent the distribution exceeds a shareholder's adjusted tax basis, will be treated as a gain to the shareholder from a sale of shares.

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As of February 29, 2024



## Class B MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges							
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Date
STATE TAX-ADVANTAGED BOND FUNDS**																	
(m) MFS® Alabama Municipal Bond Fund	09/07/93	(N/A)	MBABX	4.00	1.54	0.53	-1.60	4.93	-0.25	1.54	0.15	-2.55	0.93	-4.22	1.80	1.65	07/31/24
(m) MFS® Arkansas Municipal Bond Fund	09/07/93	(N/A)	MBARX	4.00	1.55	0.68	-1.24	4.52	-0.27	1.55	0.31	-2.18	0.52	-4.25	1.68	1.45	07/31/24
(m) MFS® California Municipal Bond Fund	09/07/93	(N/A)	MBCAX	4.00	2.22	0.90	-1.39	5.45	0.10	2.22	0.53	-2.32	1.45	-3.89	1.61	1.45	07/31/24
(m) MFS® Georgia Municipal Bond Fund	09/07/93	(N/A)	MBGAX	4.00	1.47	0.52	-1.43	4.50	-0.33	1.47	0.15	-2.38	0.50	-4.30	1.71	1.65	07/31/24
(m) MFS® Maryland Municipal Bond Fund	09/07/93	(N/A)	MBMDX	4.00	1.57	0.73	-1.24	5.06	-0.18	1.57	0.36	-2.19	1.06	-4.16	1.73	1.58	07/31/24
(m) MFS® Massachusetts Municipal Bond Fund	09/07/93	(N/A)	MBMAX	4.00	1.64	0.56	-1.47	4.66	-0.10	1.64	0.19	-2.42	0.66	-4.08	1.61	1.57	07/31/24
(m) MFS® Mississippi Municipal Bond Fund	09/07/93	(N/A)	MBMSX	4.00	1.46	0.48	-1.71	3.95	-0.30	1.46	0.12	-2.65	-0.05	-4.28	1.76	1.50	07/31/24
(m) MFS® New York Municipal Bond Fund	09/07/93	(N/A)	MBNYX	4.00	1.79	0.65	-1.60	5.86	0.06	1.79	0.28	-2.54	1.86	-3.93	1.66	1.58	07/31/24
(m) MFS® North Carolina Municipal Bond Fund	09/07/93	(N/A)	MBNCX	4.00	1.50	0.63	-1.42	4.29	-0.17	1.50	0.26	-2.37	0.29	-4.15	1.60	1.59	07/31/24
(m) MFS® Pennsylvania Municipal Bond Fund	09/07/93	(N/A)	MBPAX	4.00	1.94	0.81	-1.50	4.09	-0.21	1.94	0.44	-2.44	0.09	-4.18	1.68	1.44	07/31/24
(m) MFS® South Carolina Municipal Bond Fund	09/07/93	(N/A)	MBSCX	4.00	1.39	0.37	-1.68	4.65	-0.16	1.39	0.00	-2.63	0.65	-4.14	1.63	1.59	07/31/24
(m) MFS® Virginia Municipal Bond Fund	09/07/93	(N/A)	MBVAX	4.00	1.51	0.60	-1.54	4.46	-0.31	1.51	0.23	-2.48	0.46	-4.28	1.62	1.56	07/31/24
(m) MFS® West Virginia Municipal Bond Fund	09/07/93	(N/A)	MBWVX	4.00	1.50	0.63	-1.27	4.24	-0.31	1.50	0.27	-2.21	0.24	-4.28	1.75	1.62	07/31/24

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\*\* A small portion of income may be subject to state, federal, and/or alternative minimum tax. Capital gains, if any, are subject to a capital gains tax.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of February 29, 2024



## Class B MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
STOCK FUNDS																
Massachusetts Investors Growth Stock Fund	09/07/93	(N/A)	MIGBX	10.64	-0.76	5.37	27.66	0.07	38.81	21.54	25.25	-19.82	23.14	1.46	1.46	—
Massachusetts Investors Trust	09/07/93	(N/A)	MITBX	10.13	-0.48	7.95	22.61	-6.06	30.94	13.26	25.88	-16.96	18.27	1.45	1.45	—
MFS® Blended Research® Core Equity Fund	08/11/97	(N/A)	MUSBX	10.98	-0.11	7.32	19.43	-8.74	27.49	14.23	28.07	-16.88	27.00	1.56	1.49	01/31/25
MFS® Blended Research® Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWBX	—	—	5.62	25.68	-5.81	31.07	29.38	27.73	-30.43	39.64	1.61	1.49	09/30/24
MFS® Blended Research® Mid Cap Equity Fund	08/19/16	(N/A)	BMSBX	—	—	—	17.88	-12.06	28.99	9.34	25.38	-14.53	18.51	1.69	1.59	09/30/24
MFS® Blended Research® Small Cap Equity Fund	09/15/15	(N/A)	BRSBX	—	—	19.12	12.67	-6.42	25.02	1.07	27.79	-19.24	17.60	1.88	1.74	09/30/24
MFS® Blended Research® Value Equity Fund	09/15/15	(N/A)	BRUEX	—	—	12.99	15.57	-9.28	22.10	0.59	25.05	-5.11	13.40	1.60	1.49	09/30/24
MFS® Core Equity Fund <sup>F1</sup>	01/02/97	(N/A)	MRGBX	10.27	-1.12	10.26	23.56	-4.86	31.80	17.66	24.13	-17.82	21.96	1.67	1.66	12/31/24
MFS® Equity Income Fund	09/27/12	(N/A)	EQNBX	8.17	-1.80	9.60	18.71	-8.38	24.55	7.42	25.11	-7.84	15.04	1.71	1.64	11/30/24
MFS® Growth Fund	12/29/86	(N/A)	MEGBX	7.71	6.30	1.44	29.56	1.58	36.32	30.31	22.42	-31.84	34.78	1.60	1.59	03/31/24
MFS® Low Volatility Equity Fund	12/05/13	(N/A)	MLVBX	11.76	3.66	8.97	15.58	-2.16	25.93	10.44	24.22	-11.50	11.28	1.68	1.64	12/31/24
MFS® Mid Cap Growth Fund	12/01/93	(N/A)	OTCBX	7.75	3.47	3.58	25.01	0.04	36.51	34.31	12.90	-29.08	20.13	1.80	1.79	12/31/24
MFS® Mid Cap Value Fund	11/01/01	(N/A)	MCBVX	9.08	-3.24	14.55	12.55	-12.34	29.59	3.22	29.53	-9.66	11.68	1.75	1.74	01/31/25
MFS® New Discovery Fund	11/03/97	(N/A)	MNDBX	-8.18	-2.86	7.80	25.06	-2.37	39.76	43.57	0.48	-30.38	13.16	2.05	2.04	12/31/24
MFS® New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVBX	2.11	-3.84	25.19	13.81	-12.01	32.28	2.60	32.49	-11.74	10.12	1.95	1.94	06/30/24
MFS® Research Fund	09/07/93	(N/A)	MFRBX	9.35	0.11	7.93	22.38	-5.17	32.10	15.75	23.78	-17.89	21.56	1.55	1.55	—
MFS® Technology Fund	04/14/00	(N/A)	MTCBX	9.56	9.49	7.39	37.38	0.86	34.70	44.96	12.52	-36.69	52.78	1.90	1.89	12/31/24
MFS® Total Return Fund	08/23/93	(N/A)	MTRBX	7.50	-1.14	8.04	11.30	-6.47	19.31	8.89	13.11	-10.34	9.47	1.48	1.48	—
MFS® Utilities Fund	09/07/93	(N/A)	MMUBX	11.80	-15.43	10.55	13.89	0.03	23.97	5.21	13.02	-0.30	-2.96	1.78	1.77	02/28/25
MFS® Value Fund	11/04/97	(N/A)	MFEBC	9.47	-1.54	13.00	16.58	-10.74	28.75	2.88	24.17	-6.84	7.10	1.55	1.54	12/31/24

Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.

As of February 29, 2024



## Class B MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
ASSET ALLOCATION STRATEGIES																
MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MBAGX	2.93	-0.86	6.42	21.96	-7.65	28.66	14.68	17.97	-17.72	15.12	1.78	1.77	09/30/24
MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACBX	3.18	-1.55	4.58	10.00	-3.81	16.19	10.77	7.00	-14.08	9.57	1.59	1.59	—
MFS® Global Alternative Strategy Fund <sup>2</sup>	12/20/07	(N/A)	DVRBX	1.66	-2.66	-4.45	5.41	-1.43	11.93	3.52	2.68	-6.10	8.16	2.32	2.12	02/28/25
MFS® Growth Allocation Fund	06/28/02	(N/A)	MBGWX	2.99	-1.57	6.70	18.02	-6.53	25.24	13.60	14.85	-16.68	13.70	1.72	1.71	09/30/24
MFS® Lifetime® 2025 Fund	11/02/12	(N/A)	LTTBX	3.30	-1.48	6.47	12.18	-4.96	16.65	9.56	7.45	-13.17	9.34	1.71	1.47	08/31/24
MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTBX	3.11	-1.47	7.79	16.02	-6.60	20.75	10.72	11.69	-14.63	11.29	1.71	1.51	08/31/24
MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFEBX	2.93	-1.15	8.10	18.19	-7.96	23.87	11.79	15.98	-15.65	13.70	1.78	1.55	08/31/24
MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFBX	2.93	-0.94	7.97	19.57	-8.51	24.95	12.00	17.74	-16.13	15.14	1.78	1.57	08/31/24
MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMBX	2.95	-0.91	8.00	20.08	-8.88	25.51	12.18	19.04	-16.36	15.47	1.83	1.58	08/31/24
MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFRX	2.98	-0.96	8.01	20.03	-8.86	25.54	12.15	19.24	-16.49	15.64	1.83	1.58	08/31/24
MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFIBX	2.91	-0.81	7.89	20.03	-8.87	25.56	12.15	19.19	-16.44	15.69	1.89	1.58	08/31/24
MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJBX	—	—	—	20.03	-8.82	25.71	12.28	19.24	-16.58	15.69	2.04	1.59	08/31/24
MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLBX	2.75	-1.34	4.25	7.15	-3.37	12.68	9.06	5.50	-12.43	8.53	1.64	1.45	08/31/24
MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWBX	—	0.30	-1.97	5.69	1.00	7.70	2.02	0.36	-3.13	4.34	2.27	2.17	09/30/24
MFS® Moderate Allocation Fund	06/28/02	(N/A)	MMABX	3.35	-1.72	5.71	13.94	-5.19	20.92	12.68	10.92	-15.85	11.66	1.65	1.65	—
MFS® Prudent Investor Fund	01/18/18	(N/A)	FPPDX	—	—	—	—	—	13.05	10.19	0.82	-14.64	14.32	2.64	1.99	10/31/24

Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.

<sup>2</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.

As of February 29, 2024



## Class B MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
GLOBAL/INTERNATIONAL FUNDS																
MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKBX	—	—	13.59	37.71	-17.25	17.86	8.85	2.67	-19.85	8.72	3.20	1.99	12/31/24
MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXBX	—	—	0.61	25.89	-16.39	20.85	7.97	12.28	-14.22	13.21	1.71	1.64	12/31/24
MFS® Emerging Markets Equity Fund	10/24/95	(N/A)	MEMBX	-7.53	-13.56	7.76	36.36	-14.69	18.91	9.34	-7.69	-20.71	10.05	2.13	2.06	09/30/24
MFS® Global Equity Fund	12/29/86	(N/A)	MWEBX	2.97	-2.42	6.29	22.68	-10.50	29.22	13.03	16.19	-18.57	13.36	1.96	1.95	02/28/25
MFS® Global Growth Fund	11/18/93	(N/A)	MWOBX	3.27	-2.78	4.28	30.39	-5.67	34.36	19.33	17.46	-19.91	19.69	2.08	1.97	02/28/25
MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNBX	-6.98	1.51	5.80	28.45	-9.23	29.22	22.65	11.07	-27.63	17.29	2.53	2.10	12/31/24
MFS® Global Real Estate Fund <sup>B1</sup>	12/19/14	03/11/09 (I)	MGLDX	14.17	-0.33	6.44	11.74	-4.65	25.10	1.15	28.50	-27.76	10.15	1.95	1.94	12/31/24
MFS® Global Total Return Fund	09/07/93	(N/A)	MFWBX	2.67	-2.29	4.54	14.26	-7.84	17.32	8.48	7.48	-11.49	9.41	1.96	1.86	02/28/25
MFS® International Diversification Fund	09/30/04	(N/A)	MDIFX	-4.83	-0.84	1.43	28.91	-11.91	24.74	14.14	6.62	-17.90	13.12	1.84	1.83	09/30/24
MFS® International Growth Fund	10/24/95	(N/A)	MGRBX	-6.01	-0.71	1.61	31.13	-9.76	25.92	14.57	8.42	-15.97	13.68	1.84	1.83	09/30/24
MFS® International Intrinsic Value Fund <sup>S2</sup>	10/24/95	(N/A)	MGIBX	0.51	5.70	3.17	25.86	-9.90	24.62	19.25	9.49	-23.84	16.75	1.79	1.78	09/30/24
MFS® International New Discovery Fund <sup>S3</sup>	10/02/00	(N/A)	MIDBX	-3.66	1.71	-0.47	30.72	-11.31	21.59	8.89	3.90	-19.41	11.87	2.07	2.06	01/31/25
MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGBX	8.99	0.26	4.87	17.26	-3.38	19.37	4.37	15.74	-9.06	12.58	1.77	1.74	12/31/24
MFS® Research International Fund	01/02/98	(N/A)	MRIBX	-7.61	-2.78	-1.86	27.08	-14.85	26.74	12.02	10.78	-18.12	12.27	1.80	1.79	12/31/24

Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.

<sup>B1</sup> Performance for Class B shares includes the performance of the fund's Class I shares, adjusted to take into account differences in sales loads and class-specific operating expenses (such as Rule 12b-1 fees), if any, for periods prior to their offering. Please see the prospectus for additional information about performance and expenses.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of February 29, 2024



## Class B MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
BOND FUNDS																
MFS® Corporate Bond Fund	09/07/93	(N/A)	MFBBX	4.98	-1.11	5.03	5.28	-3.94	13.60	10.19	-2.29	-17.23	8.13	1.53	1.52	08/31/24
MFS® Emerging Markets Debt Fund	05/31/02	(N/A)	MEDBX	3.60	-1.56	8.46	8.50	-5.96	12.99	6.97	-3.42	-15.67	9.35	1.82	1.81	11/30/24
MFS® Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLBX	-5.03	-17.27	8.81	13.58	-7.06	14.89	1.67	-8.98	-9.81	12.57	2.00	1.86	02/28/25
MFS® Global High Yield Fund	07/01/98	(N/A)	MHOBX	1.72	-4.73	12.07	6.30	-3.81	13.13	3.26	1.95	-10.68	11.58	1.96	1.81	05/31/24
MFS® Global Opportunistic Bond Fund <sup>3,4</sup>	06/02/10	(N/A)	MGBBX	-1.86	-5.32	1.69	6.70	-3.15	7.49	9.82	-3.86	-11.85	7.57	1.70	1.69	03/31/24
MFS® Government Securities Fund <sup>P1</sup>	08/30/93	(N/A)	MFGBX	3.85	-0.58	-0.13	1.15	-0.48	5.30	5.56	-2.92	-13.00	3.17	1.52	1.51	06/30/24
MFS® High Income Fund	09/27/93	(N/A)	MHIBX	1.73	-4.81	12.54	5.34	-3.73	13.55	3.64	2.43	-11.19	11.33	1.64	1.63	05/31/24
MFS® Income Fund <sup>P1,5</sup>	09/07/93	(N/A)	MIOBX	2.20	-2.69	7.07	4.92	-3.09	10.40	8.69	-1.06	-14.19	6.66	1.65	1.48	02/28/25
MFS® Inflation-Adjusted Bond Fund	09/01/04	(N/A)	MIABX	1.88	-3.01	3.12	1.75	-2.73	7.11	9.59	3.72	-12.63	1.37	1.57	1.39	02/28/25
MFS® Limited Maturity Fund	09/07/93	(N/A)	MQLBX	-0.17	-0.62	0.67	0.70	0.24	4.12	3.37	-1.00	-5.00	5.15	1.48	1.32	08/31/24
MFS® Municipal High Income Fund	09/07/93	(N/A)	MMHBX	13.85	4.22	0.89	6.96	1.32	8.65	2.74	4.52	-14.47	5.35	1.66	1.36	05/31/24
MFS® Municipal Income Fund	12/29/86	(N/A)	MMIBX	10.01	2.67	0.25	4.97	0.37	7.21	3.28	2.35	-11.82	5.93	1.52	1.51	07/31/24
MFS® Municipal Limited Maturity Fund	09/07/93	(N/A)	MTLBX	2.35	1.00	-0.70	2.46	0.53	4.66	2.38	-0.03	-6.00	3.59	1.47	1.34	08/31/24
MFS® Total Return Bond Fund	12/29/00	(N/A)	MRBBX	4.99	-1.27	2.77	3.20	-1.92	9.07	7.86	-1.80	-14.58	6.26	1.53	1.35	08/31/24

Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.

<sup>3</sup> Performance information prior to December 1, 2014, reflects time periods when the fund had (i) a policy of focusing its investments on debt instruments of U.S. and foreign governments and (ii) a policy permitting the fund to invest up to 100% of its assets in less than investment grade quality debt instruments (lower quality debt instruments). The fund's investment policies and strategies changed effective December 1, 2014.

<sup>4</sup> Performance information prior to April 30, 2021, reflects time periods when the fund (i) had a policy of primarily investing in investment grade quality debt instruments and (ii) did not have a policy to engage in a currency hedging strategy to primarily expose the fund to the U.S. dollar. The fund's investment policies and strategies changed effective April 30, 2021.

<sup>5</sup> Performance information prior to December 2, 2019 reflects time periods when the fund had (i) a policy permitting the fund to invest up to 100% of its assets in below investment grade quality debt instruments and (ii) a policy permitting the fund to invest in equity securities as a principal investment strategy. The fund's investment policies and strategies changed effective December 2, 2019.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>P1</sup> A portion of the fund's distributions may include a return of capital for shareholders. Distributions that are treated for federal income tax purposes as a return of capital will reduce a shareholder's tax basis in his or her shares and, to the extent the distribution exceeds a shareholder's adjusted tax basis, will be treated as a gain to the shareholder from a sale of shares.

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As of February 29, 2024



## Class B MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
STATE TAX-ADVANTAGED BOND FUNDS**																
MFS® Alabama Municipal Bond Fund	09/07/93	(N/A)	MBABX	9.13	2.28	-0.50	3.70	0.28	6.23	3.27	1.10	-11.44	5.63	1.80	1.65	07/31/24
MFS® Arkansas Municipal Bond Fund	09/07/93	(N/A)	MBARX	8.64	2.27	-0.75	3.31	0.38	5.50	3.47	1.62	-9.95	5.07	1.68	1.45	07/31/24
MFS® California Municipal Bond Fund	09/07/93	(N/A)	MBCAX	11.26	3.77	0.18	5.34	0.19	7.53	3.23	2.17	-12.29	6.18	1.61	1.45	07/31/24
MFS® Georgia Municipal Bond Fund	09/07/93	(N/A)	MBGAX	9.38	1.95	-0.47	3.54	0.03	6.15	2.75	1.25	-10.88	5.61	1.71	1.65	07/31/24
MFS® Maryland Municipal Bond Fund	09/07/93	(N/A)	MBMDX	8.34	1.95	-0.03	3.60	0.52	5.61	3.20	1.70	-10.62	5.74	1.73	1.58	07/31/24
MFS® Massachusetts Municipal Bond Fund	09/07/93	(N/A)	MBMAX	9.82	2.32	-0.39	4.05	-0.00	6.49	2.82	1.25	-10.91	5.35	1.61	1.57	07/31/24
MFS® Mississippi Municipal Bond Fund	09/07/93	(N/A)	MBMSX	8.79	2.43	-0.70	3.47	0.38	5.76	3.67	1.29	-10.59	4.36	1.76	1.50	07/31/24
MFS® New York Municipal Bond Fund	09/07/93	(N/A)	MBNYX	10.14	2.85	-0.41	4.78	-0.09	6.83	3.03	2.19	-12.93	6.44	1.66	1.58	07/31/24
MFS® North Carolina Municipal Bond Fund	09/07/93	(N/A)	MBNCX	8.77	2.28	-0.46	3.57	-0.15	6.14	2.96	1.48	-10.42	5.00	1.60	1.59	07/31/24
MFS® Pennsylvania Municipal Bond Fund	09/07/93	(N/A)	MBPAX	10.01	2.82	0.32	4.26	0.68	6.70	3.76	1.88	-10.84	4.70	1.68	1.44	07/31/24
MFS® South Carolina Municipal Bond Fund	09/07/93	(N/A)	MBSCX	8.97	2.38	-0.77	3.46	0.27	5.73	3.28	1.02	-11.33	5.35	1.63	1.59	07/31/24
MFS® Virginia Municipal Bond Fund	09/07/93	(N/A)	MBVAX	8.75	2.53	-0.27	3.32	0.39	6.04	3.62	1.06	-10.46	5.00	1.62	1.56	07/31/24
MFS® West Virginia Municipal Bond Fund	09/07/93	(N/A)	MBWVX	9.10	2.09	-0.39	3.10	0.34	5.46	3.28	1.29	-10.04	5.22	1.75	1.62	07/31/24

Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.

\*\* A small portion of income may be subject to state, federal, and/or alternative minimum tax. Capital gains, if any, are subject to a capital gains tax.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of February 29, 2024



# Class C MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data		
STOCK FUNDS																		
(a)	Massachusetts Investors Growth Stock Fund	11/03/97	(N/A)	MIGDX	1.00	12.40	14.20	9.22	27.26	5.62	12.40	14.20	9.22	26.26	4.62	1.46	1.46	—
(a)	Massachusetts Investors Trust	07/01/96	(N/A)	MITCX	1.00	10.17	11.81	8.98	25.40	6.75	10.17	11.81	8.98	24.40	5.75	1.45	1.45	—
(a)	MFS® Blended Research® Core Equity Fund	08/11/97	(N/A)	MUECX	1.00	10.62	13.81	12.54	32.61	8.25	10.62	13.81	12.54	31.61	7.25	1.56	1.49	01/31/25
(a)	MFS® Blended Research® Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWCX	1.00	13.59	15.59	10.77	44.83	10.14	13.59	15.59	10.77	43.83	9.14	1.61	1.49	09/30/24
(a)	MFS® Blended Research® Mid Cap Equity Fund	08/19/16	(N/A)	BMSDX	1.00	9.86	10.62	8.88	16.86	5.41	9.86	10.62	8.88	15.86	4.41	1.69	1.59	09/30/24
(a)	MFS® Blended Research® Small Cap Equity Fund	09/15/15	(N/A)	BRSXH	1.00	8.00	5.40	2.96	10.62	1.11	8.00	5.40	2.96	9.62	0.11	1.88	1.74	09/30/24
(a)	MFS® Blended Research® Value Equity Fund	09/15/15	(N/A)	BRUGX	1.00	9.21	9.23	10.30	16.73	4.86	9.21	9.23	10.30	15.73	3.86	1.60	1.49	09/30/24
(a)	MFS® Core Equity Fund <sup>F1</sup>	01/02/97	(N/A)	MRGCX	1.00	11.04	12.80	9.32	26.47	6.69	11.04	12.80	9.32	25.47	5.69	1.67	1.66	12/31/24
(q)	MFS® Equity Income Fund	09/27/12	(N/A)	EQNCX	1.00	8.70	10.38	9.73	16.36	3.59	8.70	10.38	9.73	15.36	2.59	1.71	1.64	11/30/24
(a)	MFS® Growth Fund	04/01/96	(N/A)	MFEEX	1.00	12.85	14.73	8.63	46.88	13.06	12.85	14.73	8.63	45.88	12.06	1.60	1.59	03/31/24
(a)	MFS® Intrinsic Value Fund	02/08/22	(N/A)	UIVCX	1.00	7.28	—	—	25.11	5.67	7.28	—	—	24.11	4.67	8.90	1.69	11/30/24
(q)	MFS® Low Volatility Equity Fund	12/05/13	(N/A)	MLVGX	1.00	9.86	10.42	9.45	17.90	6.07	9.86	10.42	9.45	16.90	5.07	1.68	1.64	12/31/24
(a)	MFS® Mid Cap Growth Fund	08/01/94	(N/A)	OTCCX	1.00	10.37	10.63	2.17	24.99	8.59	10.37	10.63	2.17	23.99	7.59	1.80	1.79	12/31/24
(a)	MFS® Mid Cap Value Fund	11/01/01	(N/A)	MVCCX	1.00	7.79	9.60	8.41	11.00	3.46	7.79	9.60	8.41	10.00	2.46	1.75	1.74	01/31/25
(a)	MFS® New Discovery Fund	11/03/97	(N/A)	MNDCX	1.00	7.04	6.63	-7.04	9.39	4.38	7.04	6.63	-7.04	8.39	3.38	2.05	2.04	12/31/24
(a)	MFS® New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVCX	1.00	7.81	8.18	4.63	1.24	-1.42	7.81	8.18	4.63	0.28	-2.41	1.95	1.94	06/30/24
(a)	MFS® Research Fund	01/03/94	(N/A)	MFRCX	1.00	10.54	12.40	9.40	27.83	6.80	10.54	12.40	9.40	26.83	5.80	1.55	1.55	—
(a)	MFS® Technology Fund	04/14/00	(N/A)	MTCCX	1.00	15.30	15.73	6.82	60.83	13.40	15.30	15.73	6.82	59.83	12.40	1.90	1.89	12/31/24
(m)	MFS® Total Return Fund	08/01/94	(N/A)	MTRCX	1.00	5.58	6.25	3.41	9.32	0.88	5.58	6.25	3.41	8.32	-0.12	1.48	1.48	—
(q)	MFS® Utilities Fund	01/03/94	(N/A)	MMUCX	1.00	4.48	4.41	3.40	-3.95	-5.81	4.48	4.41	3.40	-4.87	-6.76	1.78	1.77	02/28/25
(q)	MFS® Value Fund	11/05/97	(N/A)	MEICX	1.00	8.03	8.84	8.15	12.77	3.94	8.03	8.84	8.15	11.77	2.94	1.55	1.54	12/31/24

\* Periods less than one year are actual not annualized.

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of February 29, 2024



## Class C MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
ASSET ALLOCATION STRATEGIES																		
(a)	MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MCAGX	1.00	7.53	8.85	4.76	16.20	3.85	7.53	8.85	4.76	15.20	2.85	1.78	1.77	09/30/24
(q)	MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACVX	1.00	3.80	4.37	0.82	9.11	1.18	3.80	4.37	0.82	8.11	0.18	1.59	1.59	—
(m)	MFS® Diversified Income Fund <sup>2</sup>	05/26/06	(N/A)	DIFCX	1.00	3.18	2.31	0.28	6.70	-0.44	3.18	2.31	0.28	5.70	-1.43	1.70	1.64	06/30/24
(a)	MFS® Global Alternative Strategy Fund <sup>3</sup>	12/20/07	(N/A)	DVRCX	1.00	2.05	3.73	3.40	10.76	3.85	2.05	3.73	3.40	9.76	2.85	2.32	2.12	02/28/25
(a)	MFS® Growth Allocation Fund	06/28/02	(N/A)	MCGWX	1.00	6.50	7.66	3.72	14.42	3.13	6.50	7.66	3.72	13.42	2.13	1.72	1.71	09/30/24
(a)	MFS® Lifetime® 2025 Fund	11/02/12	(N/A)	LTTCX	1.00	4.09	4.25	0.93	8.21	0.70	4.09	4.25	0.93	7.21	-0.30	1.71	1.47	08/31/24
(a)	MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTCX	1.00	5.34	5.76	2.28	10.44	1.44	5.34	5.76	2.28	9.44	0.44	1.71	1.51	08/31/24
(a)	MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFECX	1.00	6.42	7.40	3.93	13.22	2.45	6.42	7.40	3.93	12.22	1.45	1.78	1.55	08/31/24
(a)	MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFCX	1.00	6.92	8.15	4.86	15.12	3.22	6.92	8.15	4.86	14.12	2.22	1.78	1.57	08/31/24
(a)	MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMDX	1.00	7.13	8.53	5.23	15.55	3.46	7.13	8.53	5.23	14.55	2.46	1.83	1.58	08/31/24
(a)	MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFDX	1.00	7.16	8.59	5.34	15.85	3.63	7.16	8.59	5.34	14.85	2.63	1.83	1.58	08/31/24
(a)	MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFICX	1.00	7.16	8.60	5.34	15.83	3.62	7.16	8.60	5.34	14.83	2.62	1.89	1.58	08/31/24
(a)	MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJCX	1.00	8.98	8.63	5.28	15.88	3.67	8.98	8.63	5.28	14.88	2.67	2.04	1.59	08/31/24
(a)	MFS® Lifetime® 2065 Fund	09/01/21	(N/A)	LFTGX	1.00	0.75	—	—	15.95	3.65	0.75	—	—	14.95	2.65	9.70	1.59	08/31/24
(m)	MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLCX	1.00	2.93	3.43	0.34	7.30	0.41	2.93	3.43	0.34	6.30	-0.59	1.64	1.45	08/31/24
(a)	MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWCX	1.00	1.95	2.21	2.13	8.23	2.94	1.95	2.21	2.13	7.23	1.94	2.27	2.17	09/30/24
(q)	MFS® Moderate Allocation Fund	06/28/02	(N/A)	MMACX	1.00	5.16	6.03	2.12	11.68	2.11	5.16	6.03	2.12	10.68	1.11	1.65	1.65	—
(a)	MFS® Prudent Investor Fund	01/18/18	(N/A)	FPPEX	1.00	2.66	2.84	-0.05	10.13	-1.59	2.66	2.84	-0.05	9.13	-2.57	2.64	1.99	10/31/24

\* Periods less than one year are actual not annualized.

<sup>2</sup> Performance information prior to June 15, 2021 reflects time periods when the fund did not have an investment strategy of allocating a portion of its assets to investment grade quality debt instruments. The fund's investment strategies changed effective June 15, 2021.

<sup>3</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of February 29, 2024



# Class C MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable <div>Ⓐ Annually</div> <div>Ⓔ Semiannually</div> <div>Ⓖ Quarterly</div> <div>Ⓜ Monthly</div>					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
GLOBAL/INTERNATIONAL FUNDS																		
Ⓐ	MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKCX	1.00	4.77	1.30	-4.85	8.06	1.70	4.77	1.30	-4.85	7.06	0.70	3.20	1.99	12/31/24
Ⓐ	MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXCX	1.00	4.98	5.67	2.49	10.17	1.59	4.98	5.67	2.49	9.17	0.59	1.71	1.64	12/31/24
Ⓐ	MFS® Emerging Markets Equity Fund	06/27/96	(N/A)	MEMCX	1.00	0.95	-1.13	-8.09	6.31	-0.81	0.95	-1.13	-8.09	5.31	-1.80	2.13	2.06	09/30/24
Ⓐ	MFS® Emerging Markets Equity Research Fund	02/23/21	(N/A)	EEMRX	1.00	-8.88	—	-7.23	4.64	-1.21	-8.88	—	-7.23	3.64	-2.20	12.32	2.06	11/30/24
Ⓐ	MFS® Global Equity Fund	01/03/94	(N/A)	MWECX	1.00	6.42	7.39	3.26	11.11	2.28	6.42	7.39	3.26	10.11	1.28	1.96	1.95	02/28/25
Ⓐ	MFS® Global Growth Fund	01/03/94	(N/A)	MWOCX	1.00	9.24	10.90	5.22	20.46	4.12	9.24	10.90	5.22	19.46	3.12	2.08	1.97	02/28/25
Ⓐ	MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNCX	1.00	5.92	5.88	-0.56	11.76	1.13	5.92	5.88	-0.56	10.76	0.13	2.53	2.10	12/31/24
Ⓐ	MFS® Global Real Estate Fund <sup>D1</sup>	12/19/14	03/11/09 (I)	MGLCX	1.00	4.60	2.41	-1.15	2.13	-3.78	4.60	2.41	-1.15	1.13	-4.74	1.95	1.94	12/31/24
Ⓖ	MFS® Global Total Return Fund	01/03/94	(N/A)	MFWCX	1.00	3.71	4.40	1.28	7.72	-0.29	3.71	4.40	1.28	6.72	-1.29	1.96	1.86	02/28/25
Ⓐ	MFS® International Diversification Fund	09/30/04	(N/A)	MDIGX	1.00	4.47	5.28	0.04	9.42	0.66	4.47	5.28	0.04	8.42	-0.34	1.84	1.83	09/30/24
Ⓐ	MFS® International Growth Fund	07/01/96	(N/A)	MGRCX	1.00	5.65	6.93	2.54	12.57	2.60	5.65	6.93	2.54	11.57	1.60	1.84	1.83	09/30/24
Ⓐ	MFS® International Intrinsic Value Fund <sup>S2</sup>	07/01/96	(N/A)	MGICX	1.00	6.07	6.25	1.15	13.08	1.84	6.07	6.25	1.15	12.08	0.84	1.79	1.78	09/30/24
Ⓐ	MFS® International Large Cap Value Fund	06/30/20	(N/A)	MKVCX	1.00	9.79	—	4.85	7.74	-0.61	9.79	—	4.85	6.74	-1.61	1.82	1.71	09/30/24
Ⓐ	MFS® International New Discovery Fund <sup>S3</sup>	10/02/00	(N/A)	MIDCX	1.00	3.28	2.43	-1.75	6.99	-1.33	3.28	2.43	-1.75	5.99	-2.32	2.07	2.06	01/31/25
Ⓖ	MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGCX	1.00	6.84	7.13	7.62	15.84	3.39	6.84	7.13	7.62	14.84	2.39	1.77	1.74	12/31/24
Ⓐ	MFS® Research International Fund	01/02/98	(N/A)	MRICX	1.00	3.41	5.71	1.10	9.41	1.20	3.41	5.71	1.10	8.41	0.20	1.80	1.79	12/31/24

\* Periods less than one year are actual not annualized.

<sup>D1</sup> Performance for Class C shares includes the performance of the fund's Class I shares, adjusted to take into account differences in sales loads and class-specific operating expenses (such as Rule 12b-1 fees), if any, for periods prior to their offering. Please see the prospectus for additional information about performance and expenses.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of February 29, 2024



# Class C MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges								
	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Data	
BOND FUNDS																		
(m)	MFS® Core Bond Fund	06/22/22	(N/A)	MCBCX	1.00	0.70	—	—	2.91	-1.57	0.70	—	—	1.92	-2.55	2.21	1.39	08/31/24
(m)	MFS® Corporate Bond Fund	01/03/94	(N/A)	MFBCX	1.00	1.51	0.96	-3.66	5.39	-1.35	1.51	0.96	-3.66	4.39	-2.33	1.53	1.52	08/31/24
(m)	MFS® Emerging Markets Debt Fund	05/31/02	(N/A)	MEDCX	1.00	1.81	0.58	-2.83	8.25	0.25	1.81	0.58	-2.83	7.25	-0.74	1.82	1.81	11/30/24
(m)	MFS® Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLCX	1.00	-0.49	0.10	-2.10	8.40	-2.59	-0.49	0.10	-2.10	7.40	-3.55	2.00	1.86	02/28/25
(m)	MFS® Global High Yield Fund	07/01/98	(N/A)	MHOCX	1.00	2.64	2.52	0.73	10.24	0.76	2.64	2.52	0.73	9.24	-0.24	1.96	1.81	05/31/24
(m)	MFS® Global Opportunistic Bond Fund <sup>4,5</sup>	06/02/10	(N/A)	MGBDX	1.00	0.23	0.94	-2.54	4.35	-1.41	0.23	0.94	-2.54	3.35	-2.39	1.70	1.69	03/31/24
(m)	MFS® Government Securities Fund <sup>P1</sup>	04/01/96	(N/A)	MFGDX	1.00	-0.31	-1.11	-4.44	0.76	-2.06	-0.31	-1.11	-4.44	-0.23	-3.04	1.52	1.51	06/30/24
(m)	MFS® High Income Fund	01/03/94	(N/A)	MHICX	1.00	2.53	2.39	0.38	8.83	-0.12	2.53	2.39	0.38	7.83	-1.11	1.64	1.63	05/31/24
(m)	MFS® Income Fund <sup>P1,6</sup>	09/01/94	(N/A)	MIOCX	1.00	1.31	0.94	-3.01	4.40	-1.18	1.31	0.94	-3.01	3.40	-2.16	1.65	1.48	02/28/25
(q)	MFS® Inflation-Adjusted Bond Fund	09/01/04	(N/A)	MIACX	1.00	0.42	0.95	-2.58	-0.15	-1.11	0.42	0.95	-2.58	-1.12	-2.10	1.57	1.49	02/28/25
(m)	MFS® Limited Maturity Fund	07/01/94	(N/A)	MQLCX	1.00	0.58	0.97	-0.40	4.56	-0.00	0.58	0.97	-0.40	3.56	-1.00	1.48	1.42	08/31/24
(m)	MFS® Municipal High Income Fund	09/25/98	(N/A)	MMHCX	1.00	2.57	0.67	-2.14	5.28	0.85	2.57	0.67	-2.14	4.28	-0.15	1.66	1.61	05/31/24
(m)	MFS® Municipal Income Fund	01/03/94	(N/A)	MMICX	1.00	2.05	0.96	-1.32	5.36	0.09	2.05	0.96	-1.32	4.36	-0.91	1.52	1.51	07/31/24
(m)	MFS® Municipal Intermediate Fund	05/18/21	(N/A)	MIUCX	1.00	-1.20	—	—	4.85	0.21	-1.20	—	—	3.85	-0.79	1.68	1.45	07/31/24
(m)	MFS® Municipal Limited Maturity Fund	07/01/94	(N/A)	MTLCX	1.00	0.76	0.56	-0.77	3.60	0.06	0.76	0.56	-0.77	2.60	-0.94	1.47	1.44	08/31/24
(m)	MFS® Total Return Bond Fund	12/29/00	(N/A)	MRBCX	1.00	0.78	0.24	-3.59	3.54	-1.45	0.78	0.24	-3.59	2.54	-2.43	1.53	1.45	08/31/24

\* Periods less than one year are actual not annualized.

<sup>4</sup> Performance information prior to December 1, 2014, reflects time periods when the fund had (i) a policy of focusing its investments on debt instruments of U.S. and foreign governments and (ii) a policy permitting the fund to invest up to 100% of its assets in less than investment grade quality debt instruments (lower quality debt instruments). The fund's investment policies and strategies changed effective December 1, 2014.

<sup>5</sup> Performance information prior to April 30, 2021, reflects time periods when the fund (i) had a policy of primarily investing in investment grade quality debt instruments and (ii) did not have a policy to engage in a currency hedging strategy to primarily expose the fund to the U.S. dollar. The fund's investment policies and strategies changed effective April 30, 2021.

<sup>6</sup> Performance information prior to December 2, 2019 reflects time periods when the fund had (i) a policy permitting the fund to invest up to 100% of its assets in below investment grade quality debt instruments and (ii) a policy permitting the fund to invest in equity securities as a principal investment strategy. The fund's investment policies and strategies changed effective December 2, 2019.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>P1</sup> A portion of the fund's distributions may include a return of capital for shareholders. Distributions that are treated for federal income tax purposes as a return of capital will reduce a shareholder's tax basis in his or her shares and, to the extent the distribution exceeds a shareholder's adjusted tax basis, will be treated as a gain to the shareholder from a sale of shares.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.

Class C shares have no initial sales charge but if they are redeemed within 1 year from the end of the prior month of purchase, they may be subject to a 1% contingent deferred sales charge (CDSC).

As of February 29, 2024



## Class C MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly					Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges							
	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*	Gross	Net	Waiver End Date
<b>STATE TAX-ADVANTAGED BOND FUNDS**</b>																	
(m) MFS® California Municipal Bond Fund	01/03/94	(N/A)	MCCAX	1.00	2.05	0.71	-1.58	5.09	-0.11	2.05	0.71	-1.58	4.09	-1.10	1.61	1.60	07/31/24
(m) MFS® New York Municipal Bond Fund	12/11/00	(N/A)	MCNYX	1.00	1.79	0.63	-1.60	5.75	0.06	1.79	0.63	-1.60	4.75	-0.94	1.66	1.58	07/31/24
(m) MFS® North Carolina Municipal Bond Fund	01/03/94	(N/A)	MCNCX	1.00	1.50	0.63	-1.39	4.39	-0.17	1.50	0.63	-1.39	3.39	-1.16	1.60	1.59	07/31/24
(m) MFS® Virginia Municipal Bond Fund	01/03/94	(N/A)	MVACX	1.00	1.52	0.61	-1.51	4.45	-0.21	1.52	0.61	-1.51	3.45	-1.20	1.62	1.56	07/31/24

\* Periods less than one year are actual not annualized.

\*\* A small portion of income may be subject to state, federal, and/or alternative minimum tax. Capital gains, if any, are subject to a capital gains tax.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

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Class C shares have no initial sales charge but if they are redeemed within 1 year from the end of the prior month of purchase, they may be subject to a 1% contingent deferred sales charge (CDSC).

As of February 29, 2024



# Class C MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
STOCK FUNDS																
Massachusetts Investors Growth Stock Fund	11/03/97	(N/A)	MIGDX	10.59	-0.75	5.34	27.67	0.06	38.80	21.52	25.27	-19.83	23.14	1.46	1.46	—
Massachusetts Investors Trust	07/01/96	(N/A)	MITCX	10.19	-0.54	7.97	22.62	-6.04	30.88	13.28	25.89	-16.97	18.26	1.45	1.45	—
MFS® Blended Research® Core Equity Fund	08/11/97	(N/A)	MUECX	10.98	-0.10	7.33	19.40	-8.74	27.52	14.24	28.07	-16.89	27.02	1.56	1.49	01/31/25
MFS® Blended Research® Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWCX	—	—	5.62	25.68	-5.86	31.09	29.40	27.74	-30.45	39.65	1.61	1.49	09/30/24
MFS® Blended Research® Mid Cap Equity Fund	08/19/16	(N/A)	BMSDX	—	—	—	17.83	-11.97	28.90	9.35	25.46	-14.58	18.48	1.69	1.59	09/30/24
MFS® Blended Research® Small Cap Equity Fund	09/15/15	(N/A)	BRSHX	—	—	19.02	12.68	-6.30	24.95	1.00	27.83	-19.21	17.62	1.88	1.74	09/30/24
MFS® Blended Research® Value Equity Fund	09/15/15	(N/A)	BRUGX	—	—	12.88	15.56	-9.27	22.08	0.64	25.02	-5.10	13.39	1.60	1.49	09/30/24
MFS® Core Equity Fund <sup>F1</sup>	01/02/97	(N/A)	MRGCX	10.24	-1.09	10.28	23.51	-4.84	31.75	17.63	24.14	-17.80	21.94	1.67	1.66	12/31/24
MFS® Equity Income Fund	09/27/12	(N/A)	EQNCX	8.16	-1.80	9.56	18.71	-8.40	24.54	7.45	25.06	-7.80	14.99	1.71	1.64	11/30/24
MFS® Growth Fund	04/01/96	(N/A)	MFECX	7.69	6.31	1.44	29.56	1.58	36.32	30.30	22.42	-31.84	34.77	1.60	1.59	03/31/24
MFS® Intrinsic Value Fund	02/08/22	(N/A)	UIVCX	—	—	—	—	—	—	—	—	—	23.62	8.90	1.69	11/30/24
MFS® Low Volatility Equity Fund	12/05/13	(N/A)	MLVGX	11.80	3.69	8.87	15.66	-2.16	25.87	10.51	24.20	-11.54	11.29	1.68	1.64	12/31/24
MFS® Mid Cap Growth Fund	08/01/94	(N/A)	OTCCX	7.85	3.39	3.59	25.01	0.12	36.45	34.28	12.91	-29.07	20.11	1.80	1.79	12/31/24
MFS® Mid Cap Value Fund	11/01/01	(N/A)	MVCCX	9.10	-3.31	14.57	12.55	-12.35	29.57	3.24	29.54	-9.66	11.69	1.75	1.74	01/31/25
MFS® New Discovery Fund	11/03/97	(N/A)	MNDCX	-8.17	-2.90	7.79	25.12	-2.36	39.70	43.53	0.53	-30.34	13.09	2.05	2.04	12/31/24
MFS® New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVCX	2.12	-3.80	25.14	13.80	-11.99	32.28	2.61	32.47	-11.72	10.08	1.95	1.94	06/30/24
MFS® Research Fund	01/03/94	(N/A)	MFRCX	9.33	0.11	7.90	22.44	-5.20	32.11	15.71	23.80	-17.89	21.57	1.55	1.55	—
MFS® Technology Fund	04/14/00	(N/A)	MTCCX	9.48	9.56	7.36	37.42	0.83	34.72	44.96	12.51	-36.68	52.76	1.90	1.89	12/31/24
MFS® Total Return Fund	08/01/94	(N/A)	MTRCX	7.48	-1.13	8.06	11.24	-6.45	19.33	8.83	13.14	-10.32	9.47	1.48	1.48	—
MFS® Utilities Fund	01/03/94	(N/A)	MMUCX	11.81	-15.43	10.56	13.84	0.07	23.97	5.18	13.02	-0.29	-3.00	1.78	1.77	02/28/25
MFS® Value Fund	11/05/97	(N/A)	MEICX	9.46	-1.52	13.02	16.55	-10.76	28.76	2.90	24.16	-6.84	7.11	1.55	1.54	12/31/24

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of February 29, 2024



# Class C MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
ASSET ALLOCATION STRATEGIES																
MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MCAGX	2.86	-0.84	6.43	21.94	-7.65	28.68	14.65	17.99	-17.73	15.15	1.78	1.77	09/30/24
MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACVX	3.17	-1.61	4.64	10.04	-3.83	16.20	10.75	7.04	-14.11	9.55	1.59	1.59	—
MFS® Diversified Income Fund <sup>2</sup>	05/26/06	(N/A)	DIFCX	8.79	-2.92	7.78	7.75	-4.34	16.43	1.38	8.49	-13.68	8.51	1.70	1.64	06/30/24
MFS® Global Alternative Strategy Fund <sup>3</sup>	12/20/07	(N/A)	DVRCX	1.61	-2.69	-4.47	5.40	-1.43	11.90	3.60	2.67	-6.08	8.13	2.32	2.12	02/28/25
MFS® Growth Allocation Fund	06/28/02	(N/A)	MCGWX	3.02	-1.63	6.70	18.06	-6.54	25.25	13.62	14.85	-16.70	13.71	1.72	1.71	09/30/24
MFS® Lifetime® 2025 Fund	11/02/12	(N/A)	LTTCX	3.41	-1.47	6.47	12.14	-5.04	16.71	9.53	7.49	-13.20	9.34	1.71	1.47	08/31/24
MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTCX	3.10	-1.47	7.78	16.07	-6.66	20.78	10.75	11.70	-14.64	11.34	1.71	1.51	08/31/24
MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFECX	2.93	-1.09	8.03	18.25	-7.96	23.86	11.75	16.05	-15.72	13.76	1.78	1.55	08/31/24
MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFCX	2.94	-0.94	8.00	19.56	-8.50	24.94	12.01	17.71	-16.10	15.13	1.78	1.57	08/31/24
MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMDX	2.93	-0.87	7.93	20.06	-8.90	25.58	12.14	19.06	-16.33	15.48	1.83	1.58	08/31/24
MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFDX	2.95	-0.87	7.96	20.02	-8.88	25.55	12.17	19.23	-16.47	15.65	1.83	1.58	08/31/24
MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFICX	2.92	-0.82	7.89	20.01	-8.86	25.54	12.14	19.25	-16.46	15.66	1.89	1.58	08/31/24
MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJCX	—	—	—	20.03	-8.81	25.66	12.39	19.19	-16.58	15.64	2.04	1.59	08/31/24
MFS® Lifetime® 2065 Fund	09/01/21	(N/A)	LFTGX	—	—	—	—	—	—	—	—	-16.81	15.82	9.70	1.59	08/31/24
MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLCX	2.83	-1.42	4.26	7.16	-3.29	12.68	8.98	5.50	-12.37	8.53	1.64	1.45	08/31/24
MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWCX	—	0.29	-1.98	5.72	1.00	7.74	2.02	0.36	-3.15	4.46	2.27	2.17	09/30/24
MFS® Moderate Allocation Fund	06/28/02	(N/A)	MMACX	3.34	-1.66	5.68	13.91	-5.16	20.86	12.69	10.94	-15.82	11.61	1.65	1.65	—
MFS® Prudent Investor Fund	01/18/18	(N/A)	FPPEX	—	—	—	—	—	12.99	10.28	0.74	-14.53	14.25	2.64	1.99	10/31/24

<sup>2</sup> Performance information prior to June 15, 2021 reflects time periods when the fund did not have an investment strategy of allocating a portion of its assets to investment grade quality debt instruments. The fund's investment strategies changed effective June 15, 2021.

<sup>3</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of February 29, 2024



# Class C MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
GLOBAL/INTERNATIONAL FUNDS																
MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKCX	—	—	13.47	37.84	-17.27	17.87	8.83	2.65	-19.85	8.74	3.20	1.99	12/31/24
MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXCX	—	—	0.61	25.82	-16.36	20.81	7.99	12.33	-14.26	13.19	1.71	1.64	12/31/24
MFS® Emerging Markets Equity Fund	06/27/96	(N/A)	MEMCX	-7.56	-13.57	7.76	36.38	-14.66	18.87	9.36	-7.67	-20.73	10.05	2.13	2.06	09/30/24
MFS® Emerging Markets Equity Research Fund	02/23/21	(N/A)	EEMRX	—	—	—	—	—	—	—	—	-23.05	8.18	12.32	2.06	11/30/24
MFS® Global Equity Fund	01/03/94	(N/A)	MWECX	2.96	-2.41	6.27	22.68	-10.50	29.24	13.03	16.16	-18.57	13.35	1.96	1.95	02/28/25
MFS® Global Growth Fund	01/03/94	(N/A)	MWOCX	3.24	-2.77	4.29	30.39	-5.65	34.32	19.33	17.49	-19.91	19.69	2.08	1.97	02/28/25
MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNCX	-6.98	1.51	5.80	28.45	-9.29	29.31	22.65	11.07	-27.63	17.29	2.53	2.10	12/31/24
MFS® Global Real Estate Fund <sup>D1</sup>	12/19/14	03/11/09 (I)	MGLCX	14.17	-0.37	6.40	11.79	-4.67	25.11	1.16	28.49	-27.74	10.11	1.95	1.94	12/31/24
MFS® Global Total Return Fund	01/03/94	(N/A)	MFWCX	2.68	-2.31	4.50	14.31	-7.88	17.35	8.47	7.51	-11.54	9.45	1.96	1.86	02/28/25
MFS® International Diversification Fund	09/30/04	(N/A)	MDIGX	-4.76	-0.89	1.40	29.00	-11.91	24.73	14.13	6.62	-17.93	13.13	1.84	1.83	09/30/24
MFS® International Growth Fund	07/01/96	(N/A)	MGRCX	-6.06	-0.71	1.64	31.13	-9.75	25.89	14.59	8.41	-15.96	13.68	1.84	1.83	09/30/24
MFS® International Intrinsic Value Fund <sup>S2</sup>	07/01/96	(N/A)	MGICX	0.54	5.69	3.16	25.86	-9.92	24.64	19.25	9.48	-23.84	16.72	1.79	1.78	09/30/24
MFS® International Large Cap Value Fund	06/30/20	(N/A)	MKVCX	—	—	—	—	—	—	—	13.64	-9.84	15.08	1.82	1.71	09/30/24
MFS® International New Discovery Fund <sup>S3</sup>	10/02/00	(N/A)	MIDCX	-3.63	1.71	-0.49	30.75	-11.31	21.58	8.89	3.88	-19.40	11.89	2.07	2.06	01/31/25
MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGCX	9.00	0.29	4.80	17.27	-3.30	19.34	4.39	15.75	-9.06	12.52	1.77	1.74	12/31/24
MFS® Research International Fund	01/02/98	(N/A)	MRICX	-7.62	-2.75	-1.88	27.07	-14.82	26.69	12.08	10.76	-18.15	12.27	1.80	1.79	12/31/24

<sup>D1</sup> Performance for Class C shares includes the performance of the fund's Class I shares, adjusted to take into account differences in sales loads and class-specific operating expenses (such as Rule 12b-1 fees), if any, for periods prior to their offering. Please see the prospectus for additional information about performance and expenses.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of February 29, 2024



# Class C MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
BOND FUNDS																
MFS® Core Bond Fund	06/22/22	(N/A)	MCBCX	—	—	—	—	—	—	—	—	—	5.39	2.21	1.39	08/31/24
MFS® Corporate Bond Fund	01/03/94	(N/A)	MFBCX	4.99	-1.12	5.03	5.28	-3.94	13.53	10.20	-2.23	-17.24	8.05	1.53	1.52	08/31/24
MFS® Emerging Markets Debt Fund	05/31/02	(N/A)	MEDCX	3.60	-1.49	8.46	8.50	-5.97	12.92	6.98	-3.36	-15.69	9.27	1.82	1.81	11/30/24
MFS® Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLCX	-5.03	-17.27	8.68	13.60	-7.07	14.91	1.81	-8.98	-9.81	12.38	2.00	1.86	02/28/25
MFS® Global High Yield Fund	07/01/98	(N/A)	MHOCX	1.71	-4.77	12.09	6.47	-3.99	13.34	3.09	1.94	-10.74	11.61	1.96	1.81	05/31/24
MFS® Global Opportunistic Bond Fund <sup>4,5</sup>	06/02/10	(N/A)	MGBDX	-1.86	-5.32	1.69	6.70	-3.15	7.49	9.82	-3.97	-11.75	7.57	1.70	1.69	03/31/24
MFS® Government Securities Fund <sup>P1</sup>	04/01/96	(N/A)	MFGDX	3.85	-0.57	-0.13	1.15	-0.48	5.29	5.54	-2.91	-12.96	3.17	1.52	1.51	06/30/24
MFS® High Income Fund	01/03/94	(N/A)	MHICX	1.74	-4.78	12.51	5.34	-4.00	13.56	3.64	2.43	-11.19	11.33	1.64	1.63	05/31/24
MFS® Income Fund <sup>P1,6</sup>	09/01/94	(N/A)	MIOCX	2.20	-2.71	7.08	4.92	-3.01	10.25	8.71	-1.07	-14.09	6.66	1.65	1.48	02/28/25
MFS® Inflation-Adjusted Bond Fund	09/01/04	(N/A)	MIACX	1.87	-3.24	3.12	1.65	-2.92	7.10	9.42	3.61	-12.80	1.41	1.57	1.49	02/28/25
MFS® Limited Maturity Fund	07/01/94	(N/A)	MQLCX	-0.27	-0.72	0.58	0.60	0.14	4.01	3.27	-1.09	-5.08	5.05	1.48	1.42	08/31/24
MFS® Municipal High Income Fund	09/25/98	(N/A)	MMHCX	13.59	3.99	0.67	6.70	1.07	8.38	2.48	4.26	-14.68	5.09	1.66	1.61	05/31/24
MFS® Municipal Income Fund	01/03/94	(N/A)	MMICX	10.12	2.55	0.24	5.08	0.26	7.32	3.27	2.23	-11.70	5.92	1.52	1.51	07/31/24
MFS® Municipal Intermediate Fund	05/18/21	(N/A)	MIUCX	—	—	—	—	—	—	—	—	-8.13	5.07	1.68	1.45	07/31/24
MFS® Municipal Limited Maturity Fund	07/01/94	(N/A)	MTLCX	2.24	0.89	-0.79	2.35	0.55	4.42	2.39	-0.25	-6.08	3.60	1.47	1.44	08/31/24
MFS® Total Return Bond Fund	12/29/00	(N/A)	MRBCX	4.88	-1.37	2.67	3.10	-2.02	8.86	7.85	-1.89	-14.76	6.27	1.53	1.45	08/31/24

<sup>4</sup> Performance information prior to December 1, 2014, reflects time periods when the fund had (i) a policy of focusing its investments on debt instruments of U.S. and foreign governments and (ii) a policy permitting the fund to invest up to 100% of its assets in less than investment grade quality debt instruments (lower quality debt instruments). The fund's investment policies and strategies changed effective December 1, 2014.

<sup>5</sup> Performance information prior to April 30, 2021, reflects time periods when the fund (i) had a policy of primarily investing in investment grade quality debt instruments and (ii) did not have a policy to engage in a currency hedging strategy to primarily expose the fund to the U.S. dollar. The fund's investment policies and strategies changed effective April 30, 2021.

<sup>6</sup> Performance information prior to December 2, 2019 reflects time periods when the fund had (i) a policy permitting the fund to invest up to 100% of its assets in below investment grade quality debt instruments and (ii) a policy permitting the fund to invest in equity securities as a principal investment strategy. The fund's investment policies and strategies changed effective December 2, 2019.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>P1</sup> A portion of the fund's distributions may include a return of capital for shareholders. Distributions that are treated for federal income tax purposes as a return of capital will reduce a shareholder's tax basis in his or her shares and, to the extent the distribution exceeds a shareholder's adjusted tax basis, will be treated as a gain to the shareholder from a sale of shares.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.

As of February 29, 2024



# Class C MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Gross	Net	Waiver End Data
STATE TAX-ADVANTAGED BOND FUNDS**																
MFS® California Municipal Bond Fund	01/03/94	(N/A)	MCCAX	11.06	3.61	0.05	5.18	0.05	7.35	3.07	2.01	-12.37	6.00	1.61	1.60	07/31/24
MFS® New York Municipal Bond Fund	12/11/00	(N/A)	MCNYX	10.23	2.75	-0.32	4.77	-0.18	6.92	2.93	2.28	-12.99	6.44	1.66	1.58	07/31/24
MFS® North Carolina Municipal Bond Fund	01/03/94	(N/A)	MCNCX	8.76	2.28	-0.47	3.48	-0.07	6.04	3.03	1.40	-10.42	5.10	1.60	1.59	07/31/24
MFS® Virginia Municipal Bond Fund	01/03/94	(N/A)	MVACX	8.84	2.53	-0.36	3.32	0.48	6.03	3.62	1.06	-10.54	5.00	1.62	1.56	07/31/24

\*\* A small portion of income may be subject to state, federal, and/or alternative minimum tax. Capital gains, if any, are subject to a capital gains tax.

<sup>E1</sup> **Gross Expense Ratio** is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These contractual reductions will continue until at least date noted under the "Waiver End Date" column.

**Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit mfs.com.**

Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains.

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

**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.**