

Your Active DC Partner

Score report summary

		F1360 FIDUCIARY SCORE® AVERAGE (NUMBER OF PEERS)									
FUND NAME, CLASS R6, AS OF 3/31/25	SYMBOL	SCORE	10 YR.		5 YR.		3 YR.		1 YR.		
U.S. Equity											
Massachusetts Investors Trust	MITJX	52 (1307)	33 (828)	37 (1071)	50 (1149)	59 (1246)					
Massachusetts Investors Growth Stock Fund	MIGNX	70 (1062)	27 (734)	32 (897)	29 (959)	61 (1008)					
MFS Core Equity Fund	MRGKX	52 (1307)	28 (828)	24 (1071)	34 (1149)	55 (1246)					
MFS® Growth Fund	MFEKX	34 (1062)	13 (734)	24 (897)	29 (959)	22 (1008)					
MFS® Mid Cap Growth Fund	OTCKX	25 (492)	9 (349)	15 (424)	18 (451)	13 (474)					
MFS® Mid Cap Value Fund	MVCKX	0 (403)	4 (251)	4 (341)	4 (370)	0 (389)					
MFS® New Discovery Fund	MNDKX	61 (546)	44 (394)	36 (492)	53 (517)	74 (541)					
MFS® New Discovery Value Fund*	NDVWX	43 (485)	11 (345)	16 (424)	23 (456)	37 (477)					
MFS® Value Fund	MEIKX	20 (1102)	21 (770)	31 (984)	45 (1033)	49 (1073)					
Global/International Equity											
MFS® International Diversification Fund	MDIZX	26 (663)	— —	26 (560)	34 (603)	38 (648)					
MFS® International Equity Fund	MIEIX	0 (663)	18 (405)	14 (560)	7 (603)	20 (648)					
MFS® International Growth Fund	MGRDX	0 (379)	19 (198)	17 (310)	4 (338)	5 (359)					
MFS® International Intrinsic Value Fund¹	MINJX	29 (663)	24 (405)	26 (560)	23 (603)	23 (648)					
MFS® Research International Fund	MRSKX	75 (663)	34 (405)	24 (560)	35 (603)	58 (648)					
Fixed Income											
MFS® Corporate Bond Fund	MFBKX	13 (176)	13 (92)	18 (137)	18 (153)	11 (166)					
MFS® Emerging Markets Debt Fund	MEDHX	28 (219)	12 (97)	9 (198)	10 (210)	3 (216)					
MFS® Income Fund	MFIWX	0 (539)	— —	10 (447)	1 (489)	0 (505)					
MFS® Total Return Bond Fund	MRBKX	0 (539)	5 (342)	3 (447)	1 (489)	0 (505)					
Multi-Asset²											
MFS® Aggressive Growth Allocation Fund	MAALX	48 (183)	10 (108)	17 (163)	21 (176)	49 (181)					
MFS® Growth Allocation Fund	MAGJX	59 (294)	16 (189)	23 (252)	33 (266)	56 (288)					
MFS® Moderate Allocation Fund	MAMJX	62 (696)	32 (457)	35 (598)	50 (641)	68 (671)					
MFS® Conservative Allocation Fund	MACJX	22 (433)	7 (259)	10 (376)	11 (397)	28 (418)					
MFS® Lifetime® Income Fund	MLLKX	0 (131)	— —	7 (105)	11 (119)	16 (130)					
MFS® Lifetime® 2025 Fund	LTTKX	66 (168)	— —	40 (133)	42 (152)	67 (165)					
MFS® Lifetime® 2030 Fund	MLTKX	25 (190)	— —	21 (145)	25 (164)	48 (187)					
MFS® Lifetime® 2035 Fund	LFEKX	20 (182)	— —	13 (144)	14 (163)	17 (179)					
MFS® Lifetime® 2040 Fund	MLFKX	20 (185)	— —	12 (145)	13 (164)	13 (182)					
MFS® Lifetime® 2045 Fund	LTMLX	27 (182)	— —	15 (144)	17 (163)	24 (179)					
MFS® Lifetime® 2050 Fund	MFFKX	37 (183)	— —	15 (145)	16 (164)	24 (180)					
MFS® Lifetime® 2055 Fund	LFIKX	45 (183)	— —	15 (143)	15 (164)	25 (180)					
MFS® Lifetime® 2060 Fund	MFJKX	29 (182)	— —	20 (126)	13 (153)	20 (179)					
See next page for scoring methodology.			f1360 Fiduciary Score®		0% – 25%	26% – 50%	51% – 75%	76% – 100%			

¹ Effective at the close of business on May 29, 2015 (the “Closing Date”), the fund will be closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

² For MFS Aggressive Growth Allocation Fund, MFS Growth Allocation Fund, MFS Moderate Allocation Fund and MFS Conservative Allocation Fund, scores are calculated using Class R4 shares as Class R6 shares for these funds were just established in September 2021.

* Effective at the close of business on August 14, 2019 (the “Closing Date”), the fund will be closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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Past performance is no guarantee of future results.

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

The fi360 Fiduciary Score® is a peer percentile ranking of an investment against a set of quantitative due diligence criteria selected to reflect prudent fiduciary management. The fi360 Fiduciary Score is calculated by first combining open end mutual fund and ETF databases. (Source: Morningstar.) For each investment with at least a three-year history, fi360 calculates the fi360 Fiduciary Score based on the following due diligence criteria: regulatory oversight, minimum track record, stability of the organization, assets in the investment, composition consistency with asset class, style consistency, expense ratio/fees relative to peers, risk-adjusted performance relative to peers and performance relative to peers. Investments are evaluated at the conclusion of each calendar quarter. If an investment does not meet an individual due diligence criterion, points are awarded. Investments that satisfy all of the due diligence criteria receive a fi360 Fiduciary Score (Quarter) of 0. Every other investment is given a Score of 1 – 100 based on their point total, and representing their percentile ranking within their peer group. The fi360 Fiduciary Score represents a suggested course of action and is not intended, nor should it be used, as the sole source of information for reaching an investment decision. Visit fi360.com/fi360-Fiduciary-Score for the complete methodology document. fi360 Fiduciary Score is a registered trademark of fi360, Inc. The fi360 Fiduciary Score and data are copyright © 2025 fi360, Inc. All Rights Reserved. The information contained herein is reprinted with permission of fi360, Inc. The information (1) is proprietary to fi360 and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete or timely. Neither fi360 nor its content providers are responsible for any damages or losses arising from any use of this information.

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

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