

As of December 31, 2017

CLASS 529A MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

Distribution frequency, if applicable

- Ⓐ ANNUALLY
- Ⓢ SEMIANNUALLY
- Ⓔ QUARTERLY
- Ⓜ MONTHLY

	Class 529A inception date	Comparable share class inception date	Symbol	Max sales charge	AVERAGE ANNUAL TOTAL RETURNS (%)										EXPENSE RATIOS (%) ^{E1}		
					Not including sales charges, through 12/31/17					Including sales charges, through 12/31/17					Gross	Net	Waiver end date
STOCK FUNDS					YTD*	1 yr	3 yrs	5 yrs	10 yrs/life	YTD*	1 yr	3 yrs	5 yrs	10 yrs/life			
Ⓐ Massachusetts Investors Trust	07/31/02	(NA)	EAMTX	5.75	23.47	23.47	10.40	14.51	8.16	16.37	16.37	8.24	13.16	7.52	0.83	0.78	04/30/18
Ⓐ Massachusetts Investors Growth Stock Fund	07/31/02	(NA)	EISTX	5.75	28.63	28.63	10.90	14.62	8.96	21.23	21.23	8.73	13.28	8.32	0.84	0.79	03/31/18
Ⓐ MFS® Blended Research® Small Cap Equity Fund ¹	07/14/16	09/15/15 (I)	BRSNX	5.75	13.42	13.42	—	—	13.71	6.90	6.90	—	—	10.81	1.67	1.04	09/30/18
Ⓐ MFS® Mid Cap Growth Fund	07/31/02	(NA)	EAMCX	5.75	25.96	25.96	11.05	15.28	6.99	18.72	18.72	8.88	13.92	6.36	1.26	1.26	—
Ⓐ MFS® Mid Cap Value Fund	07/31/02	(NA)	EACVX	5.75	13.35	13.35	8.41	13.77	8.55	6.83	6.83	6.29	12.43	7.91	1.26	1.21	01/31/18
Ⓐ MFS® New Discovery Fund	07/31/02	(NA)	EANDX	5.75	25.97	25.97	10.20	11.74	9.54	18.73	18.73	8.05	10.43	8.90	1.40	1.40	—
Ⓜ MFS® Total Return Fund	07/31/02	(NA)	EATRX	5.75	12.09	12.09	6.69	9.33	5.89	5.65	5.65	4.60	8.05	5.27	0.84	0.79	01/31/18
Ⓔ MFS® Value Fund	07/31/02	(NA)	EAVLX	5.75	17.43	17.43	9.88	14.66	7.49	10.68	10.68	7.73	13.31	6.86	0.89	0.89	—
ASSET ALLOCATION STRATEGIES																	
Ⓔ MFS® Conservative Allocation Fund	07/31/02	(NA)	ECLAX	5.75	10.81	10.81	5.00	5.50	5.27	4.44	4.44	2.95	4.25	4.65	1.03	0.98	09/30/18
Ⓔ MFS® Moderate Allocation Fund	07/31/02	(NA)	EAMDX	5.75	14.78	14.78	6.55	7.57	5.76	8.18	8.18	4.47	6.30	5.14	1.08	1.03	09/30/18
Ⓐ MFS® Growth Allocation Fund	07/31/02	(NA)	EAGWX	5.75	18.84	18.84	8.18	9.55	6.04	12.00	12.00	6.07	8.26	5.41	1.15	1.09	09/30/18
Ⓐ MFS® Aggressive Growth Allocation Fund	07/31/02	(NA)	EAGTX	5.75	22.87	22.87	9.55	11.42	6.19	15.80	15.80	7.41	10.11	5.57	1.22	1.15	09/30/18
Ⓜ MFS® Lifetime® Income Fund ¹	01/08/15	09/29/05 (I)	MLLQX	5.75	8.01	8.01	4.03	4.22	5.08	1.80	1.80	2.00	3.00	4.46	1.15	0.86	08/31/18
GLOBAL/INTERNATIONAL FUNDS																	
Ⓐ MFS® International New Discovery Fund	07/31/02	(NA)	EAIDX	5.75	31.71	31.71	10.61	9.43	5.83	24.13	24.13	8.44	8.14	5.20	1.43	1.38	01/31/18
Ⓐ MFS® Research International Fund	07/31/02	(NA)	EARSX	5.75	28.00	28.00	7.42	6.45	1.67	20.64	20.64	5.32	5.20	1.07	1.16	1.16	—

* Periods less than one year are actual not annualized.

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.

The performance shown is attributable in part to unusual market conditions. These conditions may not be repeated in the future.

Class 529A shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

Sales Charge

Class 529A shares ("529A") results include the maximum sales charge.

Blended Performance Expense Considerations

¹ Performance for Class 529 shares includes the performance of the fund's Class 1 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.

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for

those accounts with assets of \$25,000 or more. Investments in 529 plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower.

The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon 529 College Savings Board, and is administered by MFS Investment Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

E1 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 fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least date noted under the "Waiver End Date" column.

Before investing in the MFS® 529 Savings Plan, consider the investment objectives, risks, charges, and expenses. For a prospectus, or summary prospectus, containing this and other information, as well as a Participant Agreement and Disclosure Statement and Expense Supplement, contact your investment professional or view online at mfs.com. Read it carefully.

As of December 31, 2017

CLASS 529A MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

Distribution frequency, if applicable

- Ⓐ ANNUALLY
- Ⓢ SEMIANNUALLY
- Ⓔ QUARTERLY
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	Class 529A inception date	Comparable share class inception date	Symbol	Max sales charge	AVERAGE ANNUAL TOTAL RETURNS (%)										EXPENSE RATIOS (%) ^{E1}		
					YTD*	Not including sales charges, through 12/31/17				Including sales charges, through 12/31/17				Gross	Net	Waiver end date	
BOND FUNDS					YTD*	1 yr	3 yrs	5 yrs	10 yrs/life	YTD*	1 yr	3 yrs	5 yrs	10 yrs/life			
Ⓜ MFS® High Income Fund	07/31/02	(NA)	EAHIX	4.25	6.09	6.09	4.85	4.60	6.01	1.58	1.58	3.35	3.70	5.55	1.07	1.02	05/31/18
Ⓜ MFS® Limited Maturity Fund	07/31/02	(NA)	EALMX	2.50	1.41	1.41	0.90	0.76	1.82	-1.12	-1.12	0.06	0.25	1.56	0.93	0.78	08/31/18
Ⓜ MFS® Total Return Bond Fund	07/31/02	(NA)	EARBX	4.25	4.05	4.05	2.31	2.29	4.58	-0.37	-0.37	0.84	1.40	4.13	1.00	0.79	08/31/18

* Periods less than one year are actual not annualized.

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For Performance Reporting Purposes

Sales Charge

Class 529A shares ("529A") results include the maximum sales charge. 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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change. **There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529 plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial**

professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investor's home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply. These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower. The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon

529 College Savings Board, and is administered by MFS Investment Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

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As of December 31, 2017

CLASS 529A MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

	Class 529A inception date	Comparable share class inception date	Symbol	PAST YEARS' ANNUAL RATES OF RETURN (%), NOT INCLUDING SALES CHARGES										EXPENSE RATIOS (%) ^{E1}		
				2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Gross	Net	Waiver end date
STOCK FUNDS																
Massachusetts Investors Trust	07/31/02	(NA)	EAMTX	-32.90	27.62	11.22	-1.87	19.10	31.86	10.96	0.19	8.76	23.47	0.83	0.78	04/30/18
Massachusetts Investors Growth Stock Fund	07/31/02	(NA)	EISTX	-37.04	40.34	14.09	1.23	16.85	30.22	11.42	-0.04	6.07	28.63	0.84	0.79	03/31/18
MFS® Blended Research® Small Cap Equity Fund ¹	07/14/16	09/15/15 (I)	BRSNX	—	—	—	—	—	—	—	—	20.06	13.42	1.67	1.04	09/30/18
MFS® Mid Cap Growth Fund	07/31/02	(NA)	EAMCX	-51.19	41.38	28.55	-6.25	16.07	36.92	8.58	4.16	4.37	25.96	1.26	1.26	—
MFS® Mid Cap Value Fund	07/31/02	(NA)	EACVX	-42.04	39.75	26.93	-2.19	18.50	36.14	9.88	-2.56	15.37	13.35	1.26	1.21	01/31/18
MFS® New Discovery Fund	07/31/02	(NA)	EANDX	-39.88	61.93	35.71	-10.51	20.79	40.83	-7.57	-2.15	8.57	25.97	1.40	1.40	—
MFS® Total Return Fund	07/31/02	(NA)	EATRX	-22.72	18.09	9.89	1.76	11.22	18.86	8.25	-0.42	8.79	12.09	0.84	0.79	01/31/18
MFS® Value Fund	07/31/02	(NA)	EAVLX	-32.99	20.42	11.26	-0.27	16.08	35.50	10.25	-0.76	13.83	17.43	0.89	0.89	—
ASSET ALLOCATION STRATEGIES																
MFS® Conservative Allocation Fund	07/31/02	(NA)	ECLAX	-16.74	22.01	11.25	2.36	10.55	8.63	3.91	-0.83	5.34	10.81	1.03	0.98	09/30/18
MFS® Moderate Allocation Fund	07/31/02	(NA)	EAMDX	-26.14	27.02	14.41	0.21	13.03	14.46	4.01	-0.95	6.40	14.78	1.08	1.03	09/30/18
MFS® Growth Allocation Fund	07/31/02	(NA)	EAGWX	-34.50	32.21	16.57	-2.34	15.59	20.14	3.71	-0.92	7.53	18.84	1.15	1.09	09/30/18
MFS® Aggressive Growth Allocation Fund	07/31/02	(NA)	EAGTX	-40.62	35.96	18.30	-5.15	17.24	26.01	3.65	-0.17	7.19	22.87	1.22	1.15	09/30/18
MFS® Lifetime® Income Fund ¹	01/08/15	09/29/05 (I)	MLLQX	-12.13	23.23	9.90	2.98	8.87	5.49	3.55	-0.75	5.01	8.01	1.15	0.86	08/31/18
GLOBAL/INTERNATIONAL FUNDS																
MFS® International New Discovery Fund	07/31/02	(NA)	EAIDX	-44.10	47.25	21.73	-10.13	24.71	19.44	-2.92	2.47	0.25	31.71	1.43	1.38	01/31/18
MFS® Research International Fund	07/31/02	(NA)	EARSX	-42.72	30.85	10.91	-10.99	16.65	18.60	-7.00	-2.04	-1.15	28.00	1.16	1.16	—

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Class 529A shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

Blended Performance Expense Considerations

¹ Performance for Class 529 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.

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529

plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

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As of December 31, 2017

CLASS 529A MFS FUND PERFORMANCE RESULTS

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



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				2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Gross	Net	Waiver end date
BOND FUNDS																
MFS® High Income Fund	07/31/02	(NA)	EAHIX	-28.61	46.57	15.28	4.03	14.08	6.03	2.45	-3.85	13.00	6.09	1.07	1.02	05/31/18
MFS® Limited Maturity Fund	07/31/02	(NA)	EALMX	-4.47	11.12	3.83	1.14	3.43	0.37	0.70	-0.08	1.39	1.41	0.93	0.78	08/31/18
MFS® Total Return Bond Fund	07/31/02	(NA)	EARBX	-6.34	20.63	8.30	6.29	7.46	-1.10	5.73	-0.58	3.51	4.05	1.00	0.79	08/31/18

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For Performance Reporting Purposes

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requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

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residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

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As of December 31, 2017

CLASS 529B MFS FUND PERFORMANCE RESULTS

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



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Distribution frequency, if applicable

- Ⓐ ANNUALLY
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- Ⓔ QUARTERLY
- Ⓜ MONTHLY

	Class 529B inception date	Comparable share class inception date	Symbol	Max sales charge	AVERAGE ANNUAL TOTAL RETURNS (%)										EXPENSE RATIOS (%) ^{E1}		
					Not including sales charges, through 12/31/17					Including sales charges, through 12/31/17					Gross	Net	Waiver end date
STOCK FUNDS					YTD*	1 yr	3 yrs	5 yrs	10 yrs/life	YTD*	1 yr	3 yrs	5 yrs	10 yrs/life			
Ⓐ Massachusetts Investors Trust	07/31/02	(NA)	EBMTX	4.00	22.57	22.57	9.69	13.72	7.42	18.57	18.57	8.86	13.48	7.42	1.58	1.53	04/30/18
Ⓐ Massachusetts Investors Growth Stock Fund	07/31/02	(NA)	EMIVX	4.00	27.67	27.67	10.05	13.74	8.17	23.67	23.67	9.21	13.50	8.17	1.59	1.54	03/31/18
Ⓐ MFS® Blended Research® Small Cap Equity Fund ¹	07/14/16	09/15/15 (I)	BRSQX	4.00	12.58	12.58	—	—	12.85	8.58	8.58	—	—	11.73	2.42	1.79	09/30/18
Ⓐ MFS® Mid Cap Growth Fund	07/31/02	(NA)	EBCGX	4.00	24.95	24.95	10.22	14.39	6.19	20.95	20.95	9.39	14.15	6.19	2.01	2.01	—
Ⓐ MFS® Mid Cap Value Fund	07/31/02	(NA)	EBCVX	4.00	12.47	12.47	7.59	12.89	7.75	8.47	8.47	6.72	12.65	7.75	2.01	1.96	01/31/18
Ⓐ MFS® New Discovery Fund	07/31/02	(NA)	EBNDX	4.00	25.04	25.04	9.38	10.90	8.74	21.04	21.04	8.54	10.63	8.74	2.15	2.15	—
Ⓜ MFS® Total Return Fund	07/31/02	(NA)	EBTRX	4.00	11.24	11.24	5.88	8.51	5.13	7.24	7.24	4.98	8.22	5.13	1.59	1.54	01/31/18
Ⓔ MFS® Value Fund	07/31/02	(NA)	EBVLX	4.00	16.65	16.65	9.29	13.95	6.77	12.65	12.65	8.44	13.71	6.77	1.64	1.64	—
ASSET ALLOCATION STRATEGIES																	
Ⓔ MFS® Conservative Allocation Fund	07/31/02	(NA)	EBCAX	4.00	9.92	9.92	4.20	4.71	4.49	5.92	5.92	3.27	4.37	4.49	1.78	1.73	09/30/18
Ⓔ MFS® Moderate Allocation Fund	07/31/02	(NA)	EBMDX	4.00	13.85	13.85	5.75	6.76	4.98	9.85	9.85	4.85	6.45	4.98	1.83	1.78	09/30/18
Ⓐ MFS® Growth Allocation Fund	07/31/02	(NA)	EBGWX	4.00	17.95	17.95	7.36	8.73	5.26	13.95	13.95	6.49	8.45	5.26	1.90	1.84	09/30/18
Ⓐ MFS® Aggressive Growth Allocation Fund	07/31/02	(NA)	EBAAX	4.00	21.90	21.90	8.72	10.57	5.41	17.90	17.90	7.87	10.30	5.41	1.97	1.90	09/30/18
Ⓜ MFS® Lifetime® Income Fund ¹	01/08/15	09/29/05 (I)	MLLRX	4.00	7.21	7.21	3.25	3.45	4.29	3.21	3.21	2.31	3.10	4.29	1.90	1.61	08/31/18
GLOBAL/INTERNATIONAL FUNDS																	
Ⓐ MFS® International New Discovery Fund	07/31/02	(NA)	EBIDX	4.00	31.17	31.17	10.18	8.83	5.16	27.17	27.17	9.35	8.55	5.16	2.18	2.13	01/31/18
Ⓐ MFS® Research International Fund	07/31/02	(NA)	EBRIX	4.00	27.01	27.01	6.60	5.64	0.92	23.01	23.01	5.71	5.31	0.92	1.91	1.91	—

* Periods less than one year are actual not annualized.

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.

The performance shown is attributable in part to unusual market conditions. These conditions may not be repeated in the future.

Class 529B shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

Sales Charge

Class 529B shares ("529B") results include the applicable contingent deferred sales charge (CDS), 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.

Blended Performance Expense Considerations

¹ Performance for Class 529 shares includes the performance of the fund's Class 1 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.

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529 plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investor's home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower.

The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon 529 College Savings Board, and is administered by MFS Investment Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

E1 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 fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least date noted under the "Waiver End Date" column.

Before investing in the MFS® 529 Savings Plan, consider the investment objectives, risks, charges, and expenses. For a prospectus, or summary prospectus, containing this and other information, as well as a Participant Agreement and Disclosure Statement and Expense Supplement, contact your investment professional or view online at mfs.com. Read it carefully.

As of December 31, 2017

CLASS 529B MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

Distribution frequency, if applicable

- Ⓐ ANNUALLY
- Ⓢ SEMIANNUALLY
- Ⓔ QUARTERLY
- Ⓜ MONTHLY

	Class 529B inception date	Comparable share class inception date	Symbol	Max sales charge	AVERAGE ANNUAL TOTAL RETURNS (%)										EXPENSE RATIOS (%) ^{E1}		
					Not including sales charges, through 12/31/17					Including sales charges, through 12/31/17					Gross	Net	Waiver end date
					YTD*	1 yr	3 yrs	5 yrs	10 yrs/life	YTD*	1 yr	3 yrs	5 yrs	10 yrs/life			
BOND FUNDS																	
Ⓜ MFS® High Income Fund	07/31/02	(NA)	EMHBX	4.00	5.29	5.29	4.16	3.86	5.26	1.29	1.29	3.24	3.53	5.26	1.82	1.77	05/31/18
Ⓜ MFS® Limited Maturity Fund	07/31/02	(NA)	EBLMX	4.00	0.64	0.64	0.13	-0.01	1.07	-3.36	-3.36	-0.86	-0.40	1.07	1.68	1.53	08/31/18
Ⓜ MFS® Total Return Bond Fund	07/31/02	(NA)	EBRBX	4.00	3.05	3.05	1.40	1.38	3.67	-0.95	-0.95	0.43	1.01	3.67	1.75	1.64	08/31/18

* Periods less than one year are actual not annualized.

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.

Class 529B shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

Sales Charge

Class 529B shares ("529B") 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.

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529 plans involve investment risks. You should consider your financial

needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower. The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon

529 College Savings Board, and is administered by MFS Investment Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

E1 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 fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least date noted under the "Waiver End Date" column.

Before investing in the MFS® 529 Savings Plan, consider the investment objectives, risks, charges, and expenses. For a prospectus, or summary prospectus, containing this and other information, as well as a Participant Agreement and Disclosure Statement and Expense Supplement, contact your investment professional or view online at mfs.com. Read it carefully.

As of December 31, 2017

CLASS 529B MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

	Class 529B inception date	Comparable share class inception date	Symbol	PAST YEARS' ANNUAL RATES OF RETURN (%), NOT INCLUDING SALES CHARGES										EXPENSE RATIOS (%) ^{E1}		
				2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Gross	Net	Waiver end date
STOCK FUNDS																
Massachusetts Investors Trust	07/31/02	(NA)	EBMTX	-33.36	26.86	10.58	-2.64	18.20	30.80	10.14	-0.53	8.26	22.57	1.58	1.53	04/30/18
Massachusetts Investors Growth Stock Fund	07/31/02	(NA)	EMIVX	-37.52	39.49	13.32	0.52	16.02	29.18	10.59	-0.86	5.28	27.67	1.59	1.54	03/31/18
MFS® Blended Research® Small Cap Equity Fund ¹	07/14/16	09/15/15 (I)	BRSQX	—	—	—	—	—	—	—	—	19.13	12.58	2.42	1.79	09/30/18
MFS® Mid Cap Growth Fund	07/31/02	(NA)	EBCGX	-51.58	40.52	27.60	-6.80	15.12	35.79	7.71	3.46	3.57	24.95	2.01	2.01	—
MFS® Mid Cap Value Fund	07/31/02	(NA)	EBCVX	-42.37	38.73	25.89	-2.82	17.61	35.04	9.05	-3.28	14.49	12.47	2.01	1.96	01/31/18
MFS® New Discovery Fund	07/31/02	(NA)	EBNDX	-40.25	60.68	34.75	-11.21	19.97	39.68	-8.24	-2.89	7.78	25.04	2.15	2.15	—
MFS® Total Return Fund	07/31/02	(NA)	EBTRX	-23.24	17.29	9.16	1.05	10.39	17.95	7.45	-1.19	7.98	11.24	1.59	1.54	01/31/18
MFS® Value Fund	07/31/02	(NA)	EBVLX	-33.43	19.52	10.42	-0.98	15.19	34.46	9.48	-1.28	13.34	16.65	1.64	1.64	—
ASSET ALLOCATION STRATEGIES																
MFS® Conservative Allocation Fund	07/31/02	(NA)	EBCAX	-17.23	21.07	10.35	1.65	9.67	7.91	3.09	-1.55	4.54	9.92	1.78	1.73	09/30/18
MFS® Moderate Allocation Fund	07/31/02	(NA)	EBMDX	-26.64	26.08	13.57	-0.50	12.16	13.56	3.27	-1.71	5.67	13.85	1.83	1.78	09/30/18
MFS® Growth Allocation Fund	07/31/02	(NA)	EBGWX	-34.93	31.26	15.69	-3.06	14.64	19.26	2.99	-1.68	6.70	17.95	1.90	1.84	09/30/18
MFS® Aggressive Growth Allocation Fund	07/31/02	(NA)	EBAAX	-40.99	34.94	17.42	-5.85	16.36	25.08	2.83	-0.93	6.40	21.90	1.97	1.90	09/30/18
MFS® Lifetime® Income Fund ¹	01/08/15	09/29/05 (I)	MLLRX	-12.79	22.32	9.08	2.22	8.06	4.70	2.78	-1.49	4.23	7.21	1.90	1.61	08/31/18
GLOBAL/INTERNATIONAL FUNDS																
MFS® International New Discovery Fund	07/31/02	(NA)	EBIDX	-44.44	46.10	20.86	-10.77	23.74	18.53	-3.69	1.73	0.24	31.17	2.18	2.13	01/31/18
MFS® Research International Fund	07/31/02	(NA)	EBRIX	-43.07	29.94	10.04	-11.67	15.83	17.63	-7.67	-2.78	-1.90	27.01	1.91	1.91	—

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The performance shown is attributable in part to unusual market conditions. These conditions may not be repeated in the future.

Class 529B shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

Blended Performance Expense Considerations

¹ Performance for Class 529 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.

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529

plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower.

The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon 529 College Savings Board, and is administered by MFS Investment Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

E1 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 fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least date noted under the "Waiver End Date" column.

Before investing in the MFS® 529 Savings Plan, consider the investment objectives, risks, charges, and expenses. For a prospectus, or summary prospectus, containing this and other information, as well as a Participant Agreement and Disclosure Statement and Expense Supplement, contact your investment professional or view online at mfs.com. Read it carefully.

As of December 31, 2017

CLASS 529B MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

	Class 529B inception date	Comparable share class inception date	Symbol	PAST YEARS' ANNUAL RATES OF RETURN (%), NOT INCLUDING SALES CHARGES										EXPENSE RATIOS (%) ^{E1}		
				2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Gross	Net	Waiver end date
BOND FUNDS																
MFS® High Income Fund	07/31/02	(NA)	EMHBX	-29.09	45.55	14.43	3.26	13.24	5.21	1.67	-4.59	12.48	5.29	1.82	1.77	05/31/18
MFS® Limited Maturity Fund	07/31/02	(NA)	EBLMX	-5.15	10.35	3.04	0.36	2.82	-0.40	-0.06	-0.85	0.62	0.64	1.68	1.53	08/31/18
MFS® Total Return Bond Fund	07/31/02	(NA)	EBRBX	-7.09	19.58	7.27	5.49	6.54	-1.93	4.73	-1.42	2.61	3.05	1.75	1.64	08/31/18

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.

Class 529B shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529 plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax

benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower. The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon 529 College Savings Board, and is administered by MFS Investment

Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

E1 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 fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least date noted under the "Waiver End Date" column.

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As of December 31, 2017

CLASS 529C MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

Distribution frequency, if applicable

- Ⓐ ANNUALLY
- Ⓢ SEMIANNUALLY
- Ⓔ QUARTERLY
- Ⓜ MONTHLY

	Class 529C inception date	Comparable share class inception date	Symbol	Max sales charge	AVERAGE ANNUAL TOTAL RETURNS (%)										EXPENSE RATIOS (%) ^{E1}		
					Not including sales charges, through 12/31/17					Including sales charges, through 12/31/17					Gross	Net	Waiver end date
STOCK FUNDS					YTD*	1 yr	3 yrs	5 yrs	10 yrs/life	YTD*	1 yr	3 yrs	5 yrs	10 yrs/life			
Ⓐ Massachusetts Investors Trust	07/31/02	(NA)	ECITX	1.00	22.54	22.54	9.55	13.63	7.38	21.54	21.54	9.55	13.63	7.38	1.58	1.53	04/30/18
Ⓐ Massachusetts Investors Growth Stock Fund	07/31/02	(NA)	EMICX	1.00	27.64	27.64	10.03	13.74	8.17	26.64	26.64	10.03	13.74	8.17	1.59	1.54	03/31/18
Ⓐ MFS® Blended Research® Small Cap Equity Fund ¹	07/14/16	09/15/15 (I)	BRSWX	1.00	12.59	12.59	—	—	12.86	11.59	11.59	—	—	12.86	2.42	1.79	09/30/18
Ⓐ MFS® Mid Cap Growth Fund	07/31/02	(NA)	ECGRX	1.00	24.94	24.94	10.19	14.37	6.18	23.94	23.94	10.19	14.37	6.18	2.01	2.01	—
Ⓐ MFS® Mid Cap Value Fund	07/31/02	(NA)	ECCVX	1.00	12.53	12.53	7.61	12.92	7.76	11.53	11.53	7.61	12.92	7.76	2.01	1.96	01/31/18
Ⓐ MFS® New Discovery Fund	07/31/02	(NA)	ECNDX	1.00	25.06	25.06	9.35	10.88	8.73	24.06	24.06	9.35	10.88	8.73	2.15	2.15	—
Ⓜ MFS® Total Return Fund	07/31/02	(NA)	ECTRXX	1.00	11.26	11.26	5.88	8.50	5.12	10.26	10.26	5.88	8.50	5.12	1.59	1.54	01/31/18
Ⓔ MFS® Value Fund	07/31/02	(NA)	ECVLX	1.00	16.51	16.51	9.01	13.76	6.68	15.51	15.51	9.01	13.76	6.68	1.64	1.64	—
ASSET ALLOCATION STRATEGIES																	
Ⓔ MFS® Conservative Allocation Fund	07/31/02	(NA)	ECACX	1.00	9.98	9.98	4.19	4.69	4.50	8.98	8.98	4.19	4.69	4.50	1.78	1.73	09/30/18
Ⓔ MFS® Moderate Allocation Fund	07/31/02	(NA)	ECMAX	1.00	13.84	13.84	5.73	6.75	4.97	12.84	12.84	5.73	6.75	4.97	1.83	1.78	09/30/18
Ⓐ MFS® Growth Allocation Fund	07/31/02	(NA)	ECGWX	1.00	17.96	17.96	7.38	8.72	5.25	16.96	16.96	7.38	8.72	5.25	1.90	1.84	09/30/18
Ⓐ MFS® Aggressive Growth Allocation Fund	07/31/02	(NA)	ECAAX	1.00	21.93	21.93	8.73	10.58	5.42	20.93	20.93	8.73	10.58	5.42	1.97	1.90	09/30/18
Ⓜ MFS® Lifetime® Income Fund ¹	01/08/15	09/29/05 (I)	MLLSX	1.00	7.11	7.11	3.22	3.43	4.28	6.11	6.11	3.22	3.43	4.28	1.90	1.61	08/31/18
GLOBAL/INTERNATIONAL FUNDS																	
Ⓐ MFS® International New Discovery Fund	07/31/02	(NA)	ECIDX	1.00	30.68	30.68	9.75	8.57	5.04	29.68	29.68	9.75	8.57	5.04	2.18	2.13	01/31/18
Ⓐ MFS® Research International Fund	07/31/02	(NA)	ECRIX	1.00	27.09	27.09	6.60	5.65	0.92	26.09	26.09	6.60	5.65	0.92	1.91	1.91	—

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The performance shown is attributable in part to unusual market conditions. These conditions may not be repeated in the future.

Class 529C shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

Sales Charge

Class 529C shares ("529C") 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).

Blended Performance Expense Considerations

¹ Performance for Class 529 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.

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529 plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investor's home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower.

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As of December 31, 2017

CLASS 529C MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

Distribution frequency, if applicable

- Ⓐ ANNUALLY
- Ⓢ SEMIANNUALLY
- Ⓔ QUARTERLY
- Ⓜ MONTHLY

	Class 529C inception date	Comparable share class inception date	Symbol	Max sales charge	AVERAGE ANNUAL TOTAL RETURNS (%)										EXPENSE RATIOS (%) ^{E1}		
					Not including sales charges, through 12/31/17					Including sales charges, through 12/31/17					Gross	Net	Waiver end date
BOND FUNDS					YTD*	1 yr	3 yrs	5 yrs	10 yrs/life	YTD*	1 yr	3 yrs	5 yrs	10 yrs/life			
Ⓜ MFS® High Income Fund	07/31/02	(NA)	EMHCX	1.00	5.29	5.29	4.06	3.81	5.23	4.29	4.29	4.06	3.81	5.23	1.82	1.77	05/31/18
Ⓜ MFS® Limited Maturity Fund	07/31/02	(NA)	ELDCX	1.00	0.56	0.56	0.05	-0.09	0.97	-0.44	-0.44	0.05	-0.09	0.97	1.68	1.63	08/31/18
Ⓜ MFS® Total Return Bond Fund	07/31/02	(NA)	ECRBX	1.00	3.05	3.05	1.43	1.40	3.68	2.05	2.05	1.43	1.40	3.68	1.75	1.64	08/31/18

* Periods less than one year are actual not annualized.

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.

Class 529C shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

Sales Charge

Class 529C shares ("529C") 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).

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529 plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in

529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower. The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon

529 College Savings Board, and is administered by MFS Investment Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

E1 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 fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least date noted under the "Waiver End Date" column.

Before investing in the MFS® 529 Savings Plan, consider the investment objectives, risks, charges, and expenses. For a prospectus, or summary prospectus, containing this and other information, as well as a Participant Agreement and Disclosure Statement and Expense Supplement, contact your investment professional or view online at mfs.com. Read it carefully.

As of December 31, 2017

CLASS 529C MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

	Class 529C inception date	Comparable share class inception date	Symbol	PAST YEARS' ANNUAL RATES OF RETURN (%), NOT INCLUDING SALES CHARGES										EXPENSE RATIOS (%) ^{E1}		
				2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Gross	Net	Waiver end date
STOCK FUNDS																
Massachusetts Investors Trust	07/31/02	(NA)	ECITX	-33.36	26.81	10.65	-2.65	18.19	30.84	10.16	-0.58	7.91	22.54	1.58	1.53	04/30/18
Massachusetts Investors Growth Stock Fund	07/31/02	(NA)	EMICX	-37.46	39.51	13.28	0.52	15.96	29.14	10.63	-0.84	5.25	27.64	1.59	1.54	03/31/18
MFS® Blended Research® Small Cap Equity Fund ¹	07/14/16	09/15/15 (I)	BRSWX	—	—	—	—	—	—	—	—	19.14	12.59	2.42	1.79	09/30/18
MFS® Mid Cap Growth Fund	07/31/02	(NA)	ECGRX	-51.56	40.53	27.58	-6.96	15.22	35.81	7.72	3.37	3.58	24.94	2.01	2.01	—
MFS® Mid Cap Value Fund	07/31/02	(NA)	ECCVX	-42.38	38.71	25.88	-2.81	17.60	35.06	9.07	-3.27	14.49	12.53	2.01	1.96	01/31/18
MFS® New Discovery Fund	07/31/02	(NA)	ECNDX	-40.28	60.77	34.67	-11.16	19.96	39.66	-8.23	-2.94	7.72	25.06	2.15	2.15	—
MFS® Total Return Fund	07/31/02	(NA)	ECTR	-23.27	17.39	9.12	0.99	10.45	17.89	7.44	-1.18	7.96	11.26	1.59	1.54	01/31/18
MFS® Value Fund	07/31/02	(NA)	ECVLX	-33.46	19.56	10.45	-1.03	15.19	34.44	9.42	-1.59	12.97	16.51	1.64	1.64	—
ASSET ALLOCATION STRATEGIES																
MFS® Conservative Allocation Fund	07/31/02	(NA)	ECACX	-17.20	21.10	10.33	1.64	9.75	7.82	3.15	-1.60	4.51	9.98	1.78	1.73	09/30/18
MFS® Moderate Allocation Fund	07/31/02	(NA)	ECMAX	-26.59	26.05	13.48	-0.52	12.17	13.60	3.26	-1.76	5.68	13.84	1.83	1.78	09/30/18
MFS® Growth Allocation Fund	07/31/02	(NA)	ECGWX	-34.99	31.27	15.79	-3.14	14.75	19.22	2.92	-1.63	6.69	17.96	1.90	1.84	09/30/18
MFS® Aggressive Growth Allocation Fund	07/31/02	(NA)	ECAAX	-40.93	34.79	17.38	-5.77	16.37	25.05	2.87	-0.90	6.38	21.93	1.97	1.90	09/30/18
MFS® Lifetime® Income Fund ¹	01/08/15	09/29/05 (I)	MLLSX	-12.79	22.32	9.08	2.22	8.06	4.70	2.78	-1.49	4.24	7.11	1.90	1.61	08/31/18
GLOBAL/INTERNATIONAL FUNDS																
MFS® International New Discovery Fund	07/31/02	(NA)	ECIDX	-44.46	46.22	20.83	-10.80	23.77	18.51	-3.69	1.66	-0.50	30.68	2.18	2.13	01/31/18
MFS® Research International Fund	07/31/02	(NA)	ECRIX	-43.13	29.97	10.04	-11.57	15.73	17.66	-7.67	-2.81	-1.91	27.09	1.91	1.91	—

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.

The performance shown is attributable in part to unusual market conditions. These conditions may not be repeated in the future.

Class 529C shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

Blended Performance Expense Considerations

¹ Performance for Class 529 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.

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529

plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower.

The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon 529 College Savings Board, and is administered by MFS Investment Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

E1 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 fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least date noted under the "Waiver End Date" column.

Before investing in the MFS® 529 Savings Plan, consider the investment objectives, risks, charges, and expenses. For a prospectus, or summary prospectus, containing this and other information, as well as a Participant Agreement and Disclosure Statement and Expense Supplement, contact your investment professional or view online at mfs.com. Read it carefully.

As of December 31, 2017

CLASS 529C MFS FUND PERFORMANCE RESULTS

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



See pages 13 - 15 regarding the specific risks for each fund

	Class 529C inception date	Comparable share class inception date	Symbol	PAST YEARS' ANNUAL RATES OF RETURN (%), NOT INCLUDING SALES CHARGES										EXPENSE RATIOS (%) ^{E1}		
				2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Gross	Net	Waiver end date
BOND FUNDS																
MFS® High Income Fund	07/31/02	(NA)	EMHCX	-28.99	45.38	14.40	3.27	13.21	5.21	1.68	-4.86	12.48	5.29	1.82	1.77	05/31/18
MFS® Limited Maturity Fund	07/31/02	(NA)	ELDCX	-5.19	10.21	2.95	0.28	2.56	-0.48	-0.15	-0.93	0.53	0.56	1.68	1.63	08/31/18
MFS® Total Return Bond Fund	07/31/02	(NA)	ECRBX	-7.10	19.72	7.27	5.49	6.44	-1.93	4.73	-1.42	2.71	3.05	1.75	1.64	08/31/18

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.

Class 529C shares are only available in conjunction with qualified tuition programs, such as the MFS 529 Savings Plan.

For Performance Reporting Purposes

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. The performance is as of the date shown; it may not include the fund's entire investment portfolio and is subject to change.

There is a \$25 annual account fee associated with the MFS 529 Savings Plan. This annual fee is waived for Oregon residents and for those accounts with assets of \$25,000 or more. Investments in 529 plans involve investment risks. You should consider your financial needs, goals, and risk tolerance prior to investing. Clients investing in 529 savings plans should consult a tax advisor or other financial professional to ensure that they obtain the desired tax benefits. Tax

benefits of investing in 529 plans depend on meeting distinct requirements such as whether an investors' home state offers state tax or other benefits only available in the home state 529 college savings plan. State benefits may include financial aid, scholarship funds and protection from creditors. Withdrawals of earnings not used to pay for qualified higher education expenses are subject to federal income tax and may be subject to an additional 10% penalty. State taxes may also apply.

These results do not include the \$25 annual account fee associated with the MFS 529 Savings Plan. If this fee was reflected, the performance shown for the Class 529 shares would have been lower. The MFS® 529 Savings Plan is a flexible college investing plan sponsored by the state of Oregon, acting by and through the Oregon 529 College Savings Board, and is administered by MFS Investment

Management. Depending on your state of residence and the state of residence of the beneficiary, an investment in the MFS 529 Savings Plan may not afford you or your beneficiary state tax or other benefits only available for investments in such state's qualified tuition program. State benefits may include financial aid, scholarship funds and protection from creditors. See your tax advisor to be sure you understand the tax issues related to a 529 plan.

E1 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 fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least date noted under the "Waiver End Date" column.

Before investing in the MFS® 529 Savings Plan, consider the investment objectives, risks, charges, and expenses. For a prospectus, or summary prospectus, containing this and other information, as well as a Participant Agreement and Disclosure Statement and Expense Supplement, contact your investment professional or view online at mfs.com. Read it carefully.

IMPORTANT RISK CONSIDERATIONS

Please see the prospectus for further information on these and other risk considerations.



STOCK FUNDS

Massachusetts Investors Trust	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions.
Massachusetts Investors Growth Stock Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in growth companies can be more sensitive to the company's earnings and more volatile than the stock market in general.
MFS® Blended Research® Small Cap Equity Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in foreign markets can involve greater risk and volatility than U.S. investments because of adverse market, currency, economic, industry, political, regulatory, geopolitical, or other conditions. • Investments in small-cap companies can be more volatile than investments in larger companies. • The fund's strategy to blend fundamental and quantitative research and to have a consistent level of active risk over time may not produce the intended results. In addition, MFS fundamental research is not available for all issuers. • MFS' investment analysis, its development and use of quantitative models, and its selection of investments may not produce the intended results and/or can lead to an investment focus that results in the fund underperforming other funds with similar investment strategies and/or underperforming the markets in which the fund invests. Investments selected using quantitative models may not produce the intended results due to the factors used in the models, the weight placed on each factor in the models, changing sources of market return, and technical issues in the design, development, implementation, and maintenance of the models (e.g., incomplete or inaccurate data, programming or other software issues, and technology failures).
MFS® Mid Cap Growth Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in mid-cap companies can be more volatile than investments in larger companies. • Investments in growth companies can be more sensitive to the company's earnings and more volatile than the stock market in general.
MFS® Mid Cap Value Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in mid-cap companies can be more volatile than investments in larger companies. • Investments in value companies can continue to be undervalued for long periods of time, not realize their expected value, and be more volatile than the stock market in general.
MFS® New Discovery Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in small-cap companies can be more volatile than investments in larger companies. • Investments in growth companies can be more sensitive to the company's earnings and more volatile than the stock market in general. • The fund's performance may be closely tied to the performance of companies in a limited number of sectors and could be more volatile than the performance of less focused funds.
MFS® Total Return Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in debt instruments may decline in value as the result of declines in the credit quality of the issuer, borrower, counterparty, or other entity responsible for payment, underlying collateral, or changes in economic, political, issuer-specific, or other conditions. Certain types of debt instruments can be more sensitive to these factors and therefore more volatile. In addition, debt instruments entail interest rate risk (as interest rates rise, prices usually fall), therefore the Fund's share price may decline during rising rates. Funds that consist of debt instruments with longer durations are generally more sensitive to a rise in interest rates than those with shorter durations. At times, and particularly during periods of market turmoil, all or a large portion of segments of the market may not have an active trading market. As a result, it may be difficult to value these investments and it may not be possible to sell a particular investment or type of investment at any particular time or at an acceptable price. The price of an instrument trading at a negative interest rate responds to interest rate changes like other debt instruments; however, an instrument purchased at a negative interest rate is expected to produce a negative return if held to maturity. • Investments in value companies can continue to be undervalued for long periods of time, not realize their expected value, and be more volatile than the stock market in general.
MFS® Value Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in value companies can continue to be undervalued for long periods of time, not realize their expected value, and be more volatile than the stock market in general.

IMPORTANT RISK CONSIDERATIONS

Please see the prospectus for further information on these and other risk considerations.



ASSET ALLOCATION STRATEGIES

<p>MFS® Conservative Allocation Fund MFS® Moderate Allocation Fund MFS® Growth Allocation Fund</p>	<p>The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in debt instruments may decline in value as the result of declines in the credit quality of the issuer, borrower, counterparty, or other entity responsible for payment, underlying collateral, or changes in economic, political, issuer-specific, or other conditions. Certain types of debt instruments can be more sensitive to these factors and therefore more volatile. In addition, debt instruments entail interest rate risk (as interest rates rise, prices usually fall), therefore the Fund's share price may decline during rising rates. Funds that consist of debt instruments with longer durations are generally more sensitive to a rise in interest rates than those with shorter durations. At times, and particularly during periods of market turmoil, all or a large portion of segments of the market may not have an active trading market. As a result, it may be difficult to value these investments and it may not be possible to sell a particular investment or type of investment at any particular time or at an acceptable price. The price of an instrument trading at a negative interest rate responds to interest rate changes like other debt instruments; however, an instrument purchased at a negative interest rate is expected to produce a negative return if held to maturity. • Investments in foreign markets can involve greater risk and volatility than U.S. investments because of adverse market, currency, economic, industry, political, regulatory, geopolitical, or other conditions. • MFS' strategy of investing in underlying funds exposes the fund to the risks of the underlying funds. Each underlying fund pursues its own objective and strategies and may not achieve its objective.</p>
<p>MFS® Aggressive Growth Allocation Fund</p>	<p>The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in foreign markets can involve greater risk and volatility than U.S. investments because of adverse market, currency, economic, industry, political, regulatory, geopolitical, or other conditions. • Investments in small-cap companies can be more volatile than investments in larger companies. • MFS' strategy of investing in underlying funds exposes the fund to the risks of the underlying funds. Each underlying fund pursues its own objective and strategies and may not achieve its objective.</p>
<p>MFS® Lifetime® Income Fund</p>	<p>The fund may not achieve its objective and/or you could lose money on your investment in the fund. There is no guarantee that the fund will provide adequate income at and through your retirement. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in debt instruments may decline in value as the result of declines in the credit quality of the issuer, borrower, counterparty, or other entity responsible for payment, underlying collateral, or changes in economic, political, issuer-specific, or other conditions. Certain types of debt instruments can be more sensitive to these factors and therefore more volatile. In addition, debt instruments entail interest rate risk (as interest rates rise, prices usually fall), therefore the Fund's share price may decline during rising rates. Funds that consist of debt instruments with longer durations are generally more sensitive to a rise in interest rates than those with shorter durations. At times, and particularly during periods of market turmoil, all or a large portion of segments of the market may not have an active trading market. As a result, it may be difficult to value these investments and it may not be possible to sell a particular investment or type of investment at any particular time or at an acceptable price. The price of an instrument trading at a negative interest rate responds to interest rate changes like other debt instruments; however, an instrument purchased at a negative interest rate is expected to produce a negative return if held to maturity.</p> <ul style="list-style-type: none"> • Investments in foreign markets can involve greater risk and volatility than U.S. investments because of adverse market, currency, economic, industry, political, regulatory, geopolitical, or other conditions. • MFS' strategy of investing in underlying funds exposes the fund to the risks of the underlying funds. Each underlying fund pursues its own objective and strategies and may not achieve its objective.

IMPORTANT RISK CONSIDERATIONS

Please see the prospectus for further information on these and other risk considerations.



GLOBAL/INTERNATIONAL FUNDS

MFS® International New Discovery Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in foreign markets can involve greater risk and volatility than U.S. investments because of adverse market, currency, economic, industry, political, regulatory, geopolitical, or other conditions. • Emerging markets can have less market structure, depth, and regulatory, custodial or operational oversight and greater political, social, and economic instability than developed markets. • Investments in small-cap companies can be more volatile than investments in larger companies. • The fund's performance may be closely tied to the performance of companies in a limited number of sectors and could be more volatile than the performance of less focused funds.
MFS® Research International Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Stock markets and investments in individual stocks are volatile and can decline significantly in response to issuer, market, economic, industry, political, regulatory, geopolitical, and other conditions. • Investments in foreign markets can involve greater risk and volatility than U.S. investments because of adverse market, currency, economic, industry, political, regulatory, geopolitical, or other conditions.

BOND FUNDS (TAXABLE)

MFS® High Income Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Investments in debt instruments may decline in value as the result of declines in the credit quality of the issuer, borrower, counterparty, or other entity responsible for payment, underlying collateral, or changes in economic, political, issuer-specific, or other conditions. Certain types of debt instruments can be more sensitive to these factors and therefore more volatile. In addition, debt instruments entail interest rate risk (as interest rates rise, prices usually fall), therefore the Fund's share price may decline during rising rates. Funds that consist of debt instruments with longer durations are generally more sensitive to a rise in interest rates than those with shorter durations. At times, and particularly during periods of market turmoil, all or a large portion of segments of the market may not have an active trading market. As a result, it may be difficult to value these investments and it may not be possible to sell a particular investment or type of investment at any particular time or at an acceptable price. The price of an instrument trading at a negative interest rate responds to interest rate changes like other debt instruments; however, an instrument purchased at a negative interest rate is expected to produce a negative return if held to maturity. • Investments in foreign markets can involve greater risk and volatility than U.S. investments because of adverse market, currency, economic, industry, political, regulatory, geopolitical, or other conditions. • Investments in derivatives can be used to take both long and short positions, be highly volatile, involve leverage (which can magnify losses), and involve risks in addition to the risks of the underlying indicator(s) on which the derivative is based, such as counterparty and liquidity risk. • Investments in below investment grade quality debt instruments can be more volatile and have greater risk of default, or already be in default, than higher-quality debt instruments.
MFS® Limited Maturity Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Investments in debt instruments may decline in value as the result of declines in the credit quality of the issuer, borrower, counterparty, or other entity responsible for payment, underlying collateral, or changes in economic, political, issuer-specific, or other conditions. Certain types of debt instruments can be more sensitive to these factors and therefore more volatile. In addition, debt instruments entail interest rate risk (as interest rates rise, prices usually fall), therefore the Fund's share price may decline during rising rates. Funds that consist of debt instruments with longer durations are generally more sensitive to a rise in interest rates than those with shorter durations. At times, and particularly during periods of market turmoil, all or a large portion of segments of the market may not have an active trading market. As a result, it may be difficult to value these investments and it may not be possible to sell a particular investment or type of investment at any particular time or at an acceptable price. The price of an instrument trading at a negative interest rate responds to interest rate changes like other debt instruments; however, an instrument purchased at a negative interest rate is expected to produce a negative return if held to maturity. • Investments in foreign markets can involve greater risk and volatility than U.S. investments because of adverse market, currency, economic, industry, political, regulatory, geopolitical, or other conditions. • Investments in derivatives can be used to take both long and short positions, be highly volatile, involve leverage (which can magnify losses), and involve risks in addition to the risks of the underlying indicator(s) on which the derivative is based, such as counterparty and liquidity risk.
MFS® Total Return Bond Fund	The fund may not achieve its objective and/or you could lose money on your investment in the fund. • Investments in debt instruments may decline in value as the result of declines in the credit quality of the issuer, borrower, counterparty, or other entity responsible for payment, underlying collateral, or changes in economic, political, issuer-specific, or other conditions. Certain types of debt instruments can be more sensitive to these factors and therefore more volatile. In addition, debt instruments entail interest rate risk (as interest rates rise, prices usually fall), therefore the Fund's share price may decline during rising rates. Funds that consist of debt instruments with longer durations are generally more sensitive to a rise in interest rates than those with shorter durations. At times, and particularly during periods of market turmoil, all or a large portion of segments of the market may not have an active trading market. As a result, it may be difficult to value these investments and it may not be possible to sell a particular investment or type of investment at any particular time or at an acceptable price. The price of an instrument trading at a negative interest rate responds to interest rate changes like other debt instruments; however, an instrument purchased at a negative interest rate is expected to produce a negative return if held to maturity. • Investments in derivatives can be used to take both long and short positions, be highly volatile, involve leverage (which can magnify losses), and involve risks in addition to the risks of the underlying indicator(s) on which the derivative is based, such as counterparty and liquidity risk. • Investments in below investment grade quality debt instruments can be more volatile and have greater risk of default, or already be in default, than higher-quality debt instruments. • Mortgage-backed securities can be subject to prepayment and/or extension and therefore can offer less potential for gains and greater potential for loss.