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ALISON O'NEILL NAMED CHIEF INVESTMENT OFFICER OF MFS

BOSTON (March 14, 2024) – MFS Investment Management® (MFS®) is announcing that Alison O'Neill will become the firm's chief investment officer, effective January 1, 2025. She will also become a member of the firm's management committee. O'Neill will oversee the firm's 300-person strong Investment team, which includes the firm's Equity, Fixed Income, Quantitative Solutions and Global Trading teams.

She will succeed Edward M. "Ted" Maloney, the firm's current CIO, who, as announced in December, will become the firm's new CEO, also effective January 1, 2025.

"Alison is an exceptional leader and culture carrier. She brings valuable investment knowledge across industries and sectors to her role as CIO, as well as deep conviction in the firm's long-term-focused investment platform. During her nearly 20 years with the firm, she has been involved in hiring and mentoring many members of the investment team and has collaborated with leadership across the department to help enhance our investment platform," said Maloney. "Alison is a fantastic teammate in the truest sense of the word, and we look forward to her bringing her unique experience and perspective to MFS' Management Committee."

O'Neill joined MFS in 2005 as an equity research analyst, was named director of research for North America in 2016, added a diversified portfolio management role in 2018 and was named co-CIO of Equity in 2020. She has worked in the industry since 2000.

About MFS

In 1924, MFS launched the first US open-end mutual fund, opening the door to the markets for millions of everyday investors. Today, as a full-service global investment manager serving financial advisors, intermediaries and institutional clients, MFS still serves a single purpose: to create long-term value for clients by allocating capital responsibly. That takes our powerful investment approach combining collective expertise, thoughtful risk management and long-term discipline. Supported by our culture of shared values and collaboration, our teams of diverse thinkers actively debate ideas and assess material risks to uncover what we believe are the best investment opportunities in the market. As of February 29, 2024, MFS managed US\$615.1 billion in assets on behalf of individual and institutional investors worldwide. Please visit [mfs.com](#) for more information.

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