



12 September 2024

MFS® is pleased to share with you information regarding upcoming investment leadership appointments, effective 1 January 2025.

Matthew Scholder and David Falco, two well respected and experienced investors, will become co-chief investment officers of Equity. They will join Jeanine Thomson, who has served as a co-CIO of Equity since 2020, and the three will lead the firm's Equity Department and report to me.

Matthew, who joined MFS in 2010, succeeds me in my current role as one of the three co-CIOs of Equity. Earlier this year MFS announced that I would become the firm's Chief Investment Officer, also effective 1 January 2025, with oversight of the firm's Global Investment Platform and the Equity, Fixed Income, Quantitative Solutions and Global Trading teams which comprise it.

David, who joined MFS in 2011, succeeds current co-CIO of Equity David Shindler in his role. David Shindler will continue as a co-portfolio manager on the firm's International Large Cap Value and Global Value equity strategies.

Matthew and David are effective and impactful investors, teammates and leaders. Their approach to both investing and collaboration is characterized by insightful thinking and clear communication. Both are dedicated to adding value across our Global Investment Platform and prioritizing the best interests of the broader team and our clients. In addition, they have already established a strong partnership with Jeanine, having worked closely with her for years as sector leaders and teammates across several of the firm's eight global sector teams.

We believe these appointments are in the best long-term interest of MFS and our clients. We look forward to the positive impact Matthew, David and Jeanine will have as a global leadership team as they work closely with me and their counterparts across our Investment Department in our Fixed Income, Quantitative Solutions and Global Trading groups.

Please reach out to your MFS relationship manager if you have any questions regarding these appointments.

Sincerely,

Alison O'Neill  
Co-Chief Investment Officer of Equity and Incoming CIO