

Executive Summary

As we celebrate our 100-year anniversary, we can also celebrate how far we've come on our DEI journey as we build our future together. In 2023, those efforts included enhancing our inclusive culture, expanding our efforts to attract, retain and develop diverse talent and focusing on being an even better version of ourselves in the century ahead. Below is an at-a-glance view of our DEI strategy and a progress update on our DEI initiatives across culture, talent and community.



CULTURE

We foster inclusion to empower employees as individuals as we build a shared commitment to delivering the best results for clients. Below are some key 2023 culture initiatives:

- **Completed our Human Rights Campaign Corporate Equality Index Survey** with a score of 90%, reflecting our support of our LGBTQ+ employees
- **Expanded our comprehensive ERG strategy to build our community of belonging** by fortifying ERG program infrastructure, elevating ERG presence with a full branding strategy and refining our ERG governance models
- **Deployed our enhanced DEI goal** with level-specific accountabilities to make sure it remained relevant and engaged employees more deeply in our DEI initiatives

As we enter this next century for MFS, we need to stay focused on our *why*: DEI ultimately is all about inclusion and impact.

Michelle Thompson-Dolberry
MFS Chief Diversity, Equity and Inclusion Officer



TALENT

As we continue to build our diverse workforce, we focus our efforts on entry level and early career talent, looking at on-campus and early career programs through a diversity lens to increase the representation of candidates from historically underrepresented groups. Below are some key 2023 talent initiatives:

- **Expanded external partnerships to broaden talent pools**, which included the National Black MBA Association, Prospanica, SHPE, Grace Hopper and NSBE
- **Expanded development partnerships** to offer development opportunities that support a broader range of underrepresented cohorts, leveraging external resources such as the Partnership, Inc.'s development program for professionals of color
- **Implemented our own Rising Star program** to support diverse aspiring leaders as they develop and leverage their strengths to build an impactful career at MFS



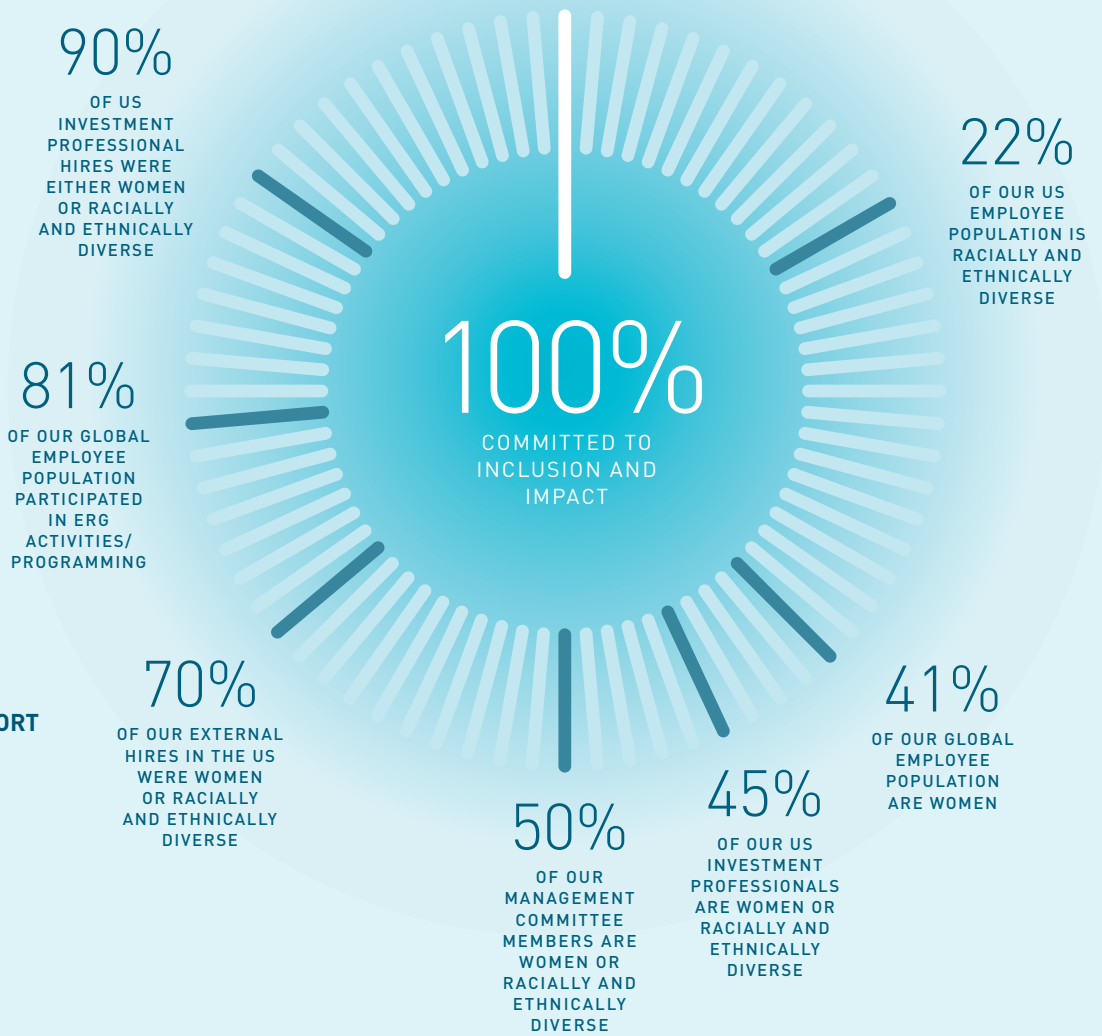
COMMUNITY

We're driving better corporate DEI practices through external partnerships with global organizations, and we're supporting underserved communities through long-term relationships with charitable partners. Below are some key 2023 community initiatives:

- **Built out our supplier diversity strategy** by adding dedicated staff and expanding our database of both certified and noncertified diverse vendors
- **Leveraged our regional councils** made up of employees who donated their time and effort to finding charitable partners aligned with our pillars and offering volunteer opportunities to support local communities
- **Increased employee volunteerism** and giving back through MFS Corporate Citizenship's Global Month of Giving Back, which featured 80 volunteer opportunities, 2571 volunteer hours tracked, 342 causes impacted and 721 employees participating

HIGHLIGHTS

2023 Firmwide Highlights – DEI Progress



/ CONNECT WITH GLOBAL ORGANIZATIONS AND SUPPORT DIVERSE COMMUNITIES /

- CFA DEI Code Signatory
- CEO Action for Diversity & Inclusion signatory
- Workforce Disclosure Initiative (ShareAction) participant and supporter
- Member of Nicsa's Diversity Project
- Member of the Diversity Project UK
- Support underserved communities through decades long charitable partnerships

/ SELF-IDENTIFICATION METRICS /

- 2.3% LGBTQ+ Identifying
- 8.7% Employees with Disabilities
- 0.6% Protected veteran

294

EMPLOYEES (147 PAIRINGS) PARTICIPATED IN OUR HIGH-POTENTIAL MENTORSHIP PROGRAM

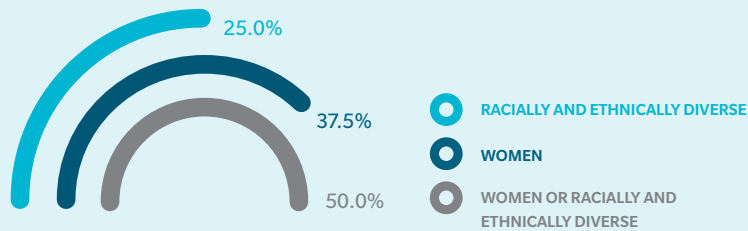
99

EMPLOYEES (58 PAIRINGS) PARTICIPATED IN WEG MFS (WOMEN'S ERG) MENTORSHIP PROGRAM

US Snapshot and Firm Metrics

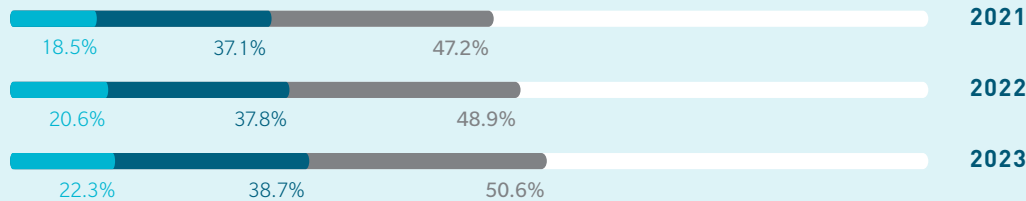
As we continue shaping our workforce to represent the world around us, self-awareness, accountability and transparency will allow us to evolve our firm accordingly. The efforts we make are focused on inclusion and impact.

/ MANAGEMENT COMMITTEE DIVERSITY /

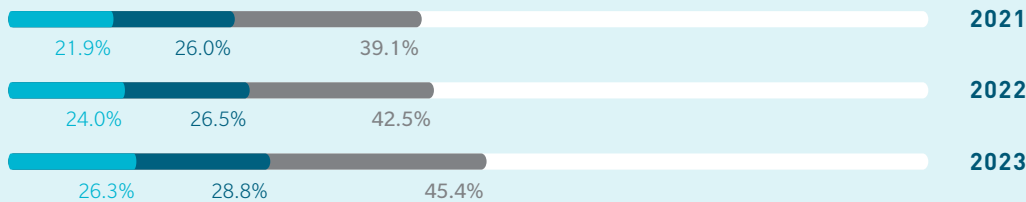


MFS is committed to increasing the representation of women and underrepresented minorities at all levels of the organization, and as we continue to do so, we expect the percentage of the firm owned by diverse populations to grow.

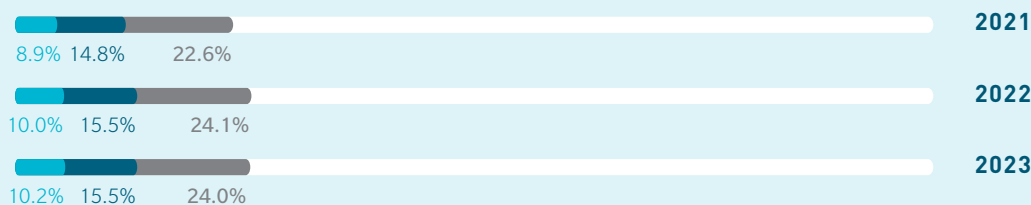
/ US TOTAL FIRM HEADCOUNT DIVERSITY /



/ US INVESTMENT PROFESSIONAL HEADCOUNT DIVERSITY /



/ US EQUITY OWNERSHIP DIVERSITY - % OWNED /



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