

MFS® Flexible Pricing Solutions

Class A share pricing — Built around your reality



We realize that trying to build a durable portfolio requires lengthening clients' time horizons. Aggregating assets and investing over time may allow for price reduction options:

MFS Right of Accumulation (ROA) - Sales charges can be reduced or eliminated on purchases of Class A shares by aggregating the total dollar amount of your clients' investments with other existing investments or any linked accounts invested in MFS funds, based on the current maximum public offering price of the funds.

MFS Investor Letter of Intent (LOI) - Sales charges can be reduced or eliminated on purchases of Class A shares if there is intent to invest a specific dollar amount, based on the gross amount of the investment, including the amount of any sales charge paid, including investments through any linked accounts in any class of any MFS fund within a 13-month period. Please see a prospectus for complete details.

\$250K
NAV

Investors can purchase Class A shares of MFS Asset Allocation Funds, MFS Tax-Advantaged Fixed Income, MFS Limited Maturity, and MFS Municipal Limited Maturity Funds, MFS Total Return Fund and MFS Global Total Return Fund at NAV (with no initial sales charge) at levels of \$250,000 or more, or through a 13-month LOI.

\$500K
NAV

Investors can purchase Class A shares of Fixed Income and MFS Lifetime Income Funds at NAV (with no initial sales charge) at levels of \$500,000 or more, or through a 13-month LOI.

Class A share pricing by type of fund (See reverse side for list of MFS funds)

PURCHASE AMOUNT	US EQUITY, GLOBAL/INTERNATIONAL EQUITY MULTI-ASSET, TARGET DATE (MFS® LIFETIME® FUNDS EXCEPT FOR INCOME) AND SPECIALTY/ALTERNATIVE		TARGET RISK (MFS® ASSET ALLOCATION FUNDS), GLOBAL TOTAL RETURN AND TOTAL RETURN		FIXED INCOME AND MFS® LIFETIME® INCOME		TAX ADVANTAGED FIXED INCOME		LIMITED MATURITY AND MUNICIPAL LIMITED MATURITY	
	SALES CHARGE ¹	DEALER PAYMENT ^{3,5}	SALES CHARGE	DEALER PAYMENT	SALES CHARGE	DEALER PAYMENT	SALES CHARGE	DEALER PAYMENT	SALES CHARGE	DEALER PAYMENT ^{4,5}
Less than \$50,000	5.75%	5.00%	5.75%	5.00%	4.25%	4.00%	4.25%	4.00%	2.50%	2.25%
\$50,000 to <\$100,000	4.75%	4.00%	4.75%	4.00%	4.25%	4.00%	4.25%	4.00%	2.25%	2.00%
\$100,000 to <\$250,000	3.75%	3.00%	3.75%	3.00%	3.25%	3.00%	3.25%	3.00%	2.00%	1.75%
\$250,000 to <\$500,000 ²	2.75%	2.25%	None	1.00%	2.25%	2.25%	None	1.00%	None	0.75%
\$500,000 to <\$1M ²	2.00%	1.75%	None	1.00%	None	1.00%	None	1.00%	None	0.75%
\$1M to \$10M ²	None	1.00%	None	1.00%	None	1.00%	None	1.00%	None	0.75%
>\$10M to \$50M ^{2,6}	None	0.50%	None	0.50%	None	0.50%	None	0.50%	None	0.50%
>\$50M ^{2,6}	None	0.25%	None	0.25%	None	0.25%	None	0.25%	None	0.25%

¹ Because of rounding in the calculation of offering price, actual sales charges paid may be more or less than those calculated using these percentages.

² Class A share net asset value (NAV) purchases: no annual commission breakpoint reset; become eligible for service fee payments in the 13th month; shares redeemed within 18 months may be subject to 1% contingent deferred sales charge (CDSC). For both Limited Maturity and Municipal Limited Maturity, class A NAV purchases that are redeemed within 18 months of purchase will be subject to a 0.75% CDSC charge.

³ Plus an annual service fee of up to 0.25%, based on average daily net assets paid quarterly. Exceptions: MFS® Total Return Bond Fund and MFS® Inflation-Adjusted Bond Fund have an annual service fee of 0.15%; AR, CA, MS and PA state municipal bond funds have an annual service fee of 0.10% and MFS® Municipal High Income Fund has a 0% annual service fee.

⁴ Plus an annual service fee of up to 0.15%, based on average daily net assets paid quarterly.

⁵ MFS Fund Distributors, Inc. does not issue trail commission payments that are less than \$100 per dealer firm.

⁶ Dealer payments on purchases over \$10 million are calculated using a blended rate. See the Statement of Additional Information for more details as well as more information about dealer payments in general.

A number of funds are subject to a variety of fee waivers and/or expense reductions. Not all funds are available in all share classes. Please check the fund's current prospectus for full details.

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

For pricing information about our Class R (for employer-sponsored retirement plans) and Class I (wrap platform) share structures, please visit the products and performance page at mfs.com or see any applicable prospectus.

US Equity, Global/International Equity, Multi Asset, Target Date (MFS Lifetime Income Funds) and Specialty/Alternative

Massachusetts Investors Trust (MITTX)
 Massachusetts Investors Growth Stock Fund (MIGFX)
 MFS® Blended Research® Core Equity Fund (MUEAX)
 MFS® Blended Research® Emerging Markets Equity Fund (BRKAX)
 MFS® Blended Research® Growth Equity Fund (BRWAX)
 MFS® Blended Research® International Equity Fund (BRXAX)
 MFS® Blended Research® Mid Cap Equity Fund (BMSFX)
 MFS® Blended Research® Small Cap Equity Fund¹ (BRSDX)
 MFS® Blended Research® Value Equity Fund (BRUDX)
 MFS® Commodity Strategy Fund (MCSAX)
 MFS® Core Equity Fund (MRGAX)
 MFS® Emerging Markets Equity Fund (MEMAX)
 MFS® Emerging Markets Equity Research Fund (EEMPX)
 MFS® Equity Income Fund (EQNAX)
 MFS® Global Alternative Strategy Fund (DVRAX)
 MFS® Global Equity Fund (MWEFX)
 MFS® Global Growth Fund (MWOFX)
 MFS® Global New Discovery Fund (GLNAX)
 MFS® Global Real Estate Fund (MGLAX)
 MFS® Growth Fund (MFE GX)
 MFS® International DiversificationSM Fund (MDIDX)
 MFS® International Equity Fund (MIEJX)
 MFS® International Growth Fund (MGRAX)
 MFS® International Intrinsic Value Fund^b (MGIAX)
 MFS® International Large Cap Value Fund (MKVVBX)
 MFS® International New Discovery Fund^a (MIDAX)
 MFS® Intrinsic Value Fund (UIVVX)
 MFS® Lifetime® Funds:
 2025 Fund (LTTAX), 2030 Fund (MLTAX), 2035 Fund (LFEAX),
 2040 Fund (MLFAX), 2045 Fund (LTM AX), 2050 Fund (MFFSX),
 2055 Fund (LFIAX), 2060 Fund (MFJAX), 2065 Fund (LFTFX)
 MFS® Low Volatility Equity Fund (MLVAX)
 MFS® Low Volatility Global Equity Fund (MVGAX)
 MFS® Managed Wealth Fund (MNWAX)
 MFS® Mid Cap Growth Fund (OTCAX)
 MFS® Mid Cap Value Fund (MVCAX)
 MFS® New Discovery Fund (MNDAX)
 MFS® New Discovery Value Fund^c (NDVAX)
 MFS® Prudent Investor Fund (FPPAX)
 MFS® Research Fund (MFRFX)
 MFS® Research International Fund (MRSAX)
 MFS® Technology Fund (MTCAX)
 MFS® Utilities Fund (MMUFX)
 MFS® Value Fund (MEIAX)

Target Risk and Total Return

MFS® Aggressive Growth Allocation Fund (MAAGX)
 MFS® Conservative Allocation Fund (MACFX)
 MFS® Global Total Return Fund (MFWTX)
 MFS® Growth Allocation Fund (MAGWX)
 MFS® Moderate Allocation Fund (MAMAX)
 MFS® Total Return Fund (MSFRX)

Fixed Income and MFS Lifetime Income

MFS® Core Bond Fund (MCBEX)
 MFS® Corporate Bond Fund (MFBFX)
 MFS® Diversified Income Fund⁶ (DIFAX)
 MFS® Emerging Markets Debt Fund (MEDAX)
 MFS® Emerging Markets Debt Local Currency Fund (EMLAX)
 MFS® Global High Yield Fund (MHOAX)
 MFS® Global Opportunistic Bond Fund^d (MGBAX)
 MFS® Government Securities Fund (MFGSX)
 MFS® High Income Fund (MHITX)
 MFS® Income Fund (MFI OX)
 MFS® Inflation-Adjusted Bond Fund (MIAAX)
 MFS® Lifetime® Income Fund⁶ (MLLAX)
 MFS® Total Return Bond Fund (MRBFX)

Tax-Advantaged Fixed Income

MFS® Municipal High Income Fund (MMHYX)
 MFS® Municipal Income Fund (MFIAX)
 MFS® Municipal Intermediate Fund (MIUAX)
 MFS® State Municipal Bond Funds

Limited Maturity

MFS® Limited Maturity Fund (MQLFX)
 MFS® Municipal Limited Maturity Fund (MTLFX)

A number of funds are subject to a variety of fee waivers and/or expense reductions.

⁶ Please check the fund's current prospectus for full details. This fund has fixed income pricing but is categorized as Multi-Asset.

Please check with your firm for specific fund availability.

^a Effective at the close of business on November 29, 2019 (the "Closing Date"), the fund will be closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

^b 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. Effective June 1, 2019, the name of the MFS® International Value Fund changed to MFS® International Intrinsic Value Fund. There was no change to the fund's investment strategy or objective.

^c Effective at the close of business on August 14, 2019, the fund will be closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

^d Effective April 30, 2021, the MFS® Global Bond Fund name was changed to MFS® Global Opportunistic Bond Fund.

Please see a prospectus for complete details.

You should consider your client's financial needs, goals, and risk tolerance before making any investment recommendations. For further details, please refer to mfs.com and the appropriate fund's prospectus. For pricing information about our Class R (for employer-sponsored retirement plans) and Class I (wrap platform) share structures, please visit the products and performance page at mfs.com or any applicable prospectus.

Note: The funds and other information in this piece are subject to change.

Before investing, consider the funds' 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. Read it carefully.

NEXT STEPS

CHECK OUT HOW OUR FLEXIBLE PRICING CAN FIT YOUR BUSINESS. CALL US FOR SALES AND MARKETING SUPPORT AT 1-800-343-2829.

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