



MFS

Investment Summary

01970 SH MFS 2
 NATHANIEL W MCCONATHY
 279 ZANDALE DR
 LEXINGTON KY 40503-2661



January 1, 2020 through December 31, 2020

Page 1 of 8

For help with your investments, contact
Dealer:

PLEASE PROVIDE NAME OF
 YOUR INVESTMENT DEALER
 111 HUNTINGTON AVE
 BOSTON MA 02199-7610

mfs.com

Online account access, fund information, investor education and
 mailing address information

24-hour-a-day automated information

Automated voice response service 1-800-MFS-TALK
 (1-800-637-8255)

Personal Account Service

Personal Account Services 1-800-225-2606
 IRA Account Services 1-800-637-1255
 529 Plan Services 1-866-529-1637

The total value of your portfolio as of 12/31/2020

Portfolio at a Glance

	Quarter beginning 10/01/2020	Year beginning 01/01/2020
Beginning value		
Total additions		
Exchanges and other additions		
Total reductions		
Exchanges and other reductions		
Change in value		
Ending value 12/31/2020		

Your personal MFS® portfolio performance

Year to date

Your year-to-date personal MFS portfolio performance is calculated using a formula that reflects the results of your investment performance as well as your account activity. Other formulas may yield different results. Past performance is no guarantee of future results. For additional details on this calculation, please visit mfs.com/cak.

Please see *Important Disclosures* at the end of the *Account Activity* section for information about how the Fund(s) average annual total returns for each share class is calculated.

Account Summary

	Beginning value 01/01/2020	Total additions	Total reductions	+/-	Change in value	=	Ending value 12/31/2020
M	2						
M.	.4						
M	5						
M	9						
N	2						
M	4						
					\$0.00		

Year-to-Date Earnings

Dividends

Capital gains

00 070 - 0001
 CI - 0 - SH - 4 NYX N - 07154 - M
 3 4 - 0 96 - 1 0
 12 - J

