



Trading Idea IF

MFS Meridian Prudent Wealth Fund

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Our Chief Investment Office (CIO) believes that with President Trump in office, investors should prepare for volatility and potential policy surprises, particularly with respect to trade policy, and should consider portfolio diversification.

One of our solutions to navigate political risks is the **MFS Meridian Prudent Wealth Fund**. This solution offers the following characteristics:

- Conservative high conviction (30-50 companies) equity strategy with the flexibility to invest up to 40% in cash (or short-term government bonds) and that uses put options to mitigate volatility
- Proven concept and process that is live since 2011. Research is based on bottom-up fundamental analysis with the goal to invest in undervalued, quality companies (value/quality style)
- The fund looks for companies with a track record of value creation, competitive advantages that enables sustainable returns, a strong balance sheet, high free cash flows and a strong management
- Experienced investment team who can rely on deep research resources available at MFS.

Risks: The fund invests in equities and is thus riskier than cash or bonds. The fund pursues an active management style and hence performance can deviate from the broad equity market. The fund invests into equities in different currencies which can impact the value of the investment. The fund also invests in debt instruments that can be impacted by interest rate changes. Additional information about these and other risks can be found in the KID as well as in the prospectus of the fund. Past performance is no indication of future results.

The above information is for marketing purposes and should not be considered as personal investment advice.

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