Q3 | 2022
As of September 30, 2022
Fact Sheet

MFS® Blended Research® Core Equity Fund

Objective

Seeks capital appreciation.

Investment team

Lead Portfolio Manager
Matt Krummell, CFA
- 20 years with MFS
- 29 years in industry

Portfolio Managers
Jim Fallon
- 22 years with MFS
- 23 years in industry

Jonathan Sage, CFA
- 22 years with MFS
- 26 years in industry

Jed Stocks, CFA
- 22 years with MFS
- 23 years in industry

Fund benchmark

Standard & Poor's 500 Stock Index

Risk measures vs. benchmark

(Class I)

Alpha	-0.89
Beta	1.00
Sharpe Ratio	0.69
Standard Deviation	14.56

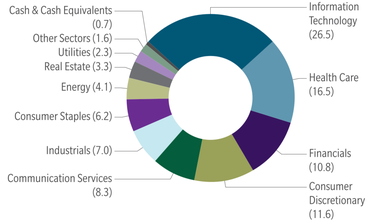
Risk measures are based on a trailing 10 year period.

Fund Symbol and CUSIP

I	MUSEX	55273W103
R6	MUEVX	55273W483
A	MUEAX	55273W400
C	MUECX	55273W608

This fund uses an actively managed approach and a consistent, disciplined bottom-up stock selection and portfolio construction process that blends fundamental and quantitative research to build a well-diversified, large-cap core equity portfolio.

Sectors ()

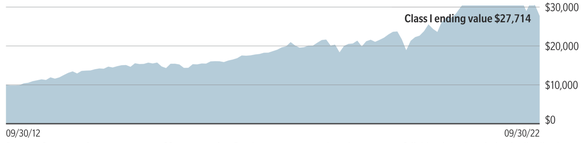


Top 10 holdings

MICROSOFT CORP
APPLE INC
ALPHABET INC
AMAZON.COM INC (EQ)
JOHNSON & JOHNSON
MERCK & CO INC
MCKESSON CORP
CIGNA CORP (EQ)
CHENIERE ENERGY INC
ARCHER-DANIELS-MIDLAND CO

33.3% of total net assets

Growth of $10,000 Class I shares 09/30/12 – 10/30/22



Past performance is no guarantee of future results. Fund returns assume the reinvestment of dividends and capital gain distributions. Class I shares are available without a sales charge to eligible investors.

Average annual total returns (%)

	Inception Date	10 Year	5 Year	3 Year	1 Year
Class I	01/14/94	10.73	8.23	8.73	-13.31
Class R6	06/01/12	10.86	8.35	8.83	-13.22
Class A **without sales charge**	08/07/97	10.46	7.97	8.45	-13.53
Class A **with 5.75% maximum sales charge**	08/07/97	9.81	6.69	6.33	-18.50
Standard & Poor's 500 Stock Index	N/A	11.70	9.24	8.16	-15.47

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Performance results reflect any applicable expense subsidies and waivers in effect during the periods shown. Without such subsidies and waivers the fund's performance results would be less favorable. All results assume the reinvestment of dividends and capital gains. It is not possible to invest directly in an index.

Performance for Class R shares includes the performance of the fund's Class I shares, adjusted to take into account differences in sales loads and class-specific operating expenses (such as Rule 12b-1 fees), if any, for periods prior to their offering. Please see the prospectus for additional information about performance and expenses.

Class R6 shares are available without a sales charge to eligible investors.

NOT FDIC INSURED - MAY LOSE VALUE - NO BANK GUARANTEE

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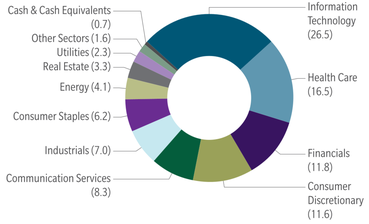

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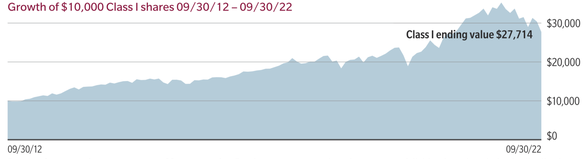
Growth of $10,000 Class I shares 09/30/12 – 09/30/22



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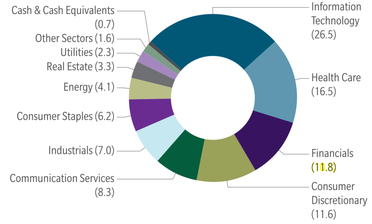

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ARCHER-DANIELS-MIDLAND CO
33.3% of total net assets

Growth of $10,000 Class I shares 09/30/12 – 09/30/22

Past performance is no guarantee of future results. Fund returns assume the reinvestment of dividends and capital gain distributions. Class I shares are available without a sales charge to eligible investors.

Average annual total returns (%)

	Inception Date	10 Year	5 Year	3 Year	1 Year
Class I	01/14/94	10.73	8.23	8.73	-13.31
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Class A **without sales charge**	08/07/97	10.46	7.97	8.45	-13.53
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Performance for Class R shares includes the performance of the fund's Class I shares, adjusted to take into account differences in sales loads and class-specific operating expenses (such as Rule 12b-1 fees), if any, for periods prior to their offering. Please see the prospectus for additional information about performance and expenses.

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MFS® Blended Research® Core Equity Fund

Glossary

Alpha is a measure of the portfolio's risk-adjusted performance. When compared to the portfolio's beta, a positive alpha indicates better-than-expected portfolio performance and a negative indicates alpha worse-than-expected portfolio performance.

Beta is a measure of the volatility of a portfolio relative to the overall market. A beta less than 1.0 indicates lower risk than the market; a beta greater than 1.0 indicates higher risk than the market. It is most reliable as a risk measure when the return fluctuations of the portfolio are highly correlated with the return fluctuations of the index chosen to represent the market.

Sharpe Ratio is a risk-adjusted measure calculated to determine reward per unit of risk. It uses a standard deviation and excess return. The higher the Sharpe Ratio, the better the portfolio's historical risk-adjusted performance.

Standard Deviation is an indicator of the portfolio's total return volatility, which is based on a minimum of 36 monthly returns. The larger the portfolio's standard deviation, the greater the portfolio's volatility.

Market Capitalization is the value of a corporation as determined by the market price of its outstanding common stock. It is calculated by multiplying the number of shares by the current market price of a share.

Price/Book ratio (P/B) is the ratio of a stock's price to its book value per share.

Weighted average price/earnings (P/E) ratio is the ratio of the current price of a stock to an estimate of forward 12 month earnings; P/E ex-negatives ratio is an exposure-weighted average of the P/E ratios of the securities held, excluding companies with projected negative earnings.

is the percentage of a portfolio's securities that have changed over the course of a year: (lesser of purchases or sales)/average market value.

Portfolio characteristics are based on equivalent exposure, which measures how a portfolio's value would change due to price changes in an asset held either directly or, in the case of a derivative contract, indirectly. The market value of the holding may differ. The portfolio is actively managed, and current holdings may be different.

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1-800-225-2606 mfs.com

CALENDAR YEAR TOTAL RETURNS (%)

	'12	'13	'14	'15	'16	'17	'18	'19	'20	'21
Class I	15.30	35.98	12.14	0.92	8.36	20.63	-7.84	28.81	15.36	29.38
Standard & Poor's 500 Stock Index	16.00	32.39	13.69	1.38	11.96	21.83	-4.38	31.49	18.40	28.71

Past performance is no guarantee of future results.

FUND EXPENSES (%)

	Class I	Class R6	Class A
Gross Expense Ratio	0.56	0.46	0.81
Net Expense Ratio	0.49	0.42	0.74

Gross Expense Ratio is the fund's total operating expense ratio from the fund's most recent prospectus. **Net Expense Ratio** reflects the reduction of expenses from contractual fee waivers and reimbursements. Elimination of these reductions will result in higher expenses and lower performance. These reductions will continue until at least January 31, 2023.

FUND DATA

Inception Date	01/14/94
Net Assets	$928.4 million
Number of Issues	114
Market Cap (weighted avg.)	$463.1 billion
Price/Book (weighted avg.)	34
Price/Earnings (12 months forward weighted avg.)	13.6
Turnover Ratio	43%

Important risk considerations

The fund may not achieve its objective and/or you could lose money on your investment in the fund. ■ **Stock:** Stock markets and investments in individual stocks are volatile and can decline significantly in response to or investor perception of, issuer, market, economic, industry, political, regulatory, geopolitical, environmental, public health, and other conditions. ■ **Strategy:** There is no assurance that the portfolio's predicted tracking error will equal its target predicted tracking error at any point in time or consistently for any period of time, or that the portfolio's predicted tracking error and actual tracking error will be similar. The portfolio's strategy to target a predicted tracking error of approximately 2% compared to the Index and to blend fundamental and quantitative research may not produce the intended results. In addition, MFS fundamental research is not available for all issuers. ■ **Quantitative Strategy:** MFS' investment analysis, development and use of quantitative models, and selection of investments may not produce the intended results and/or can lead to an investment focus that results in underperforming portfolios with similar investment strategies and/or the markets in which the portfolio invests. The proprietary and third party quantitative models used by MFS may not produce the intended results for a variety of reasons, including the factors used, the weight placed on each factor, changing sources of market return, changes from the market factors' historical trends, and technical issues in the development, application, and maintenance of the models (e.g., incomplete or inaccurate data, programming/software issues, coding errors and technology failures). ■ Please see the prospectus for further information on these and other risk considerations.

Benchmark and vendor disclosures:

Standard & Poor's 500 Stock Index - a market capitalization-weighted index of 500 widely held equity securities, designed to measure broad U.S. equity performance.

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Before investing, consider the fund's investment objectives, risks, charges, and expenses. For a prospectus, or summary prospectus, containing this and other information, contact your investment professional or view online at mfs.com. Please read it carefully.

UNE-FS-10-22
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Fact Sheet | Q3 | 2022

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Glossary

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MFS Fund Distributors, Inc.
1-800-225-2606 mfs.com

CALENDAR YEAR TOTAL RETURNS (%)

	'12	'13	'14	'15	'16	'17	'18	'19	'20	'21
Class I	15.30	35.98	12.14	0.92	8.36	20.63	-7.84	28.81	15.36	29.38
Standard & Poor's 500 Stock Index	16.00	32.39	13.69	1.38	11.96	21.83	-4.38	31.49	18.40	28.71

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FUND EXPENSES (%)

	Class I	Class R6	Class A
Gross Expense Ratio	0.56	0.46	0.81
Net Expense Ratio	0.49	0.42	0.74

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FUND DATA

Inception Date	01/14/94
Net Assets	$928.4 million
Number of Issues	114
Market Cap (weighted avg.)	$463.1 billion
Price/Book (weighted avg.)	3.4
Price/Earnings (12 months forward weighted avg.)	13.6
Turnover Ratio	43%

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