

MFS Investments portfolio management update

Effective June 30th, 2021, Jude Jason will join the portfolio management team of Kevin Beatty, Ted Maloney and Alison O'Neill on the American Equity Fund (MFS). Jude joined MFS in 2012 as an equity research analyst.

Kevin Beatty, current portfolio manager of the American Equity Fund (MFS) has announced his retirement effective September 30th, 2021. Kevin Beatty will continue as portfolio manager until his retirement date.

The fund's benchmark, fee, investment objective and style remain unchanged and no action is required.

Fund code	Fund name	Portfolio managers prior to June 30 th , 2021	Portfolio managers after June 30 th , 2021
AEMB	American Equity Fund (MFS)	Kevin Beatty Ted Maloney Alison O'Neill	Ted Maloney Alison O'Neill Jude Jason

April 28, 2021