

As of May 31, 2026

# Distribution Update



Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class	Class Inception Date	Comparable Share Class Inception Date	CUSIP Number	Symbol	Public Offering Price	Distribution Rate (%)	Taxable Equivalent Yield at NAV	SEC Yield (%)		Average Annual Total Returns (%)			
									With Waiver	Without Waiver	Including Sales Charges			
											10 yr /Life	5 yr	3 yr	1 yr
<b>DOMESTIC FUNDS</b>														
(a) MFS <sup>®</sup> Equity Income Fund	A	09/27/12	(N/A)	552988636	EQNAX	26.14	1.08	(N/A)	1.56	1.53	11.84	10.61	17.22	21.02
	B	09/27/12	(N/A)	552988628	EQNBX	24.69	0.48	(N/A)	0.92	0.89	11.66	10.82	17.95	23.39
	C	09/27/12	(N/A)	552988610	EQNCX	24.66	0.53	(N/A)	0.92	0.89	11.66	11.10	18.67	26.44
	I	09/27/12	(N/A)	552988594	EQNIX	24.66	1.34	(N/A)	1.90	1.87	12.78	12.19	19.86	28.63
(m) MFS <sup>®</sup> Total Return Fund	A	10/06/70	(N/A)	552981300	MSFRX	20.79	2.37	(N/A)	2.44	2.44	6.67	3.71	8.38	5.01
	B	08/23/93	(N/A)	552981409	MTRBX	19.70	1.73	(N/A)	1.86	1.86	6.50	3.86	8.88	6.59
	C	08/01/94	(N/A)	552981607	MTRCX	19.84	1.76	(N/A)	1.85	1.85	6.49	4.16	9.71	9.60
	I	01/02/97	(N/A)	552981805	MTRIX	19.58	2.76	(N/A)	2.84	2.84	7.56	5.21	10.82	11.70
(a) MFS <sup>®</sup> Utilities Fund	A	02/14/92	(N/A)	552986309	MMUFX	27.77	1.45	(N/A)	1.61	1.60	8.16	6.55	9.02	8.03
	B	09/07/93	(N/A)	552986408	MMUBX	26.09	0.75	(N/A)	0.99	0.97	7.99	6.71	9.55	9.81
	C	01/03/94	(N/A)	552986705	MMUCX	26.01	0.90	(N/A)	0.96	0.94	7.99	7.02	10.36	12.80
	I	01/02/97	(N/A)	552986879	MMUIX	26.35	1.74	(N/A)	1.97	1.95	9.08	8.10	11.49	14.94
(a) MFS <sup>®</sup> Value Fund	A	01/02/96	(N/A)	552983801	MEIAX	55.05	2.06	(N/A)	1.06	1.05	9.09	6.21	11.63	6.51
	B	11/04/97	(N/A)	552983843	MFE BX	51.87	1.37	(N/A)	0.38	0.37	8.92	6.37	12.22	8.19
	C	11/05/97	(N/A)	552983835	MEICX	51.08	1.54	(N/A)	0.38	0.37	8.92	6.68	13.01	11.19
	I	01/02/97	(N/A)	552983694	MEIIX	52.34	2.38	(N/A)	1.37	1.36	10.01	7.75	14.15	13.31
<b>GLOBAL/INTERNATIONAL FUNDS</b>														
(a) MFS <sup>®</sup> Global Total Return Fund	A	09/04/90	(N/A)	552986101	MFWTX	19.33	1.09	(N/A)	2.24	2.14	5.84	3.53	9.22	7.72
	B	09/07/93	(N/A)	552986200	MFWBX	18.71	0.23	(N/A)	1.71	1.60	5.68	3.67	9.75	9.43
	C	01/03/94	(N/A)	552986804	MFWCX	18.24	0.50	(N/A)	1.65	1.54	5.68	3.98	10.58	12.44
	I	01/02/97	(N/A)	552986853	MFWIX	17.91	1.40	(N/A)	2.63	2.52	6.74	5.02	11.68	14.58
<b>ASSET ALLOCATION STRATEGIES</b>														
(a) MFS <sup>®</sup> Conservative Allocation Fund	A	06/28/02	(N/A)	55273G827	MACFX	18.29	1.51	(N/A)	2.95	2.95	5.27	2.43	6.77	3.29
	B	06/28/02	(N/A)	55273G819	MACBX	17.22	0.73	(N/A)	2.38	2.38	5.10	2.54	7.21	4.75
	C	06/28/02	(N/A)	55273G793	MACVX	16.91	0.97	(N/A)	2.38	2.38	5.10	2.88	8.08	7.78
	I	06/28/02	(N/A)	55273G785	MACIX	17.47	1.79	(N/A)	3.37	3.37	6.16	3.91	9.17	9.86

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<b>TAXABLE BOND FUNDS (Continued)</b>														
(M) MFS <sup>®</sup> Global High Yield Fund	A	07/01/98	(N/A)	552984700	MHOAX	5.95	4.84	(N/A)	5.40	5.15	4.52	3.18	7.53	2.81
	B	07/01/98	(N/A)	552984809	MHOBX	5.71	4.30	(N/A)	4.90	4.65	4.19	2.95	7.42	2.38
	C	07/01/98	(N/A)	552984882	MHOCX	5.69	4.30	(N/A)	4.90	4.65	4.17	3.27	8.29	5.39
	I	07/01/98	(N/A)	552984874	MHOIX	5.69	5.30	(N/A)	5.90	5.66	5.20	4.31	9.30	7.45
(M) MFS <sup>®</sup> Global Opportunistic Bond Fund <sup>2,3</sup>	A	06/02/10	(N/A)	552746638	MGBAX	8.54	3.50	(N/A)	3.83	3.82	1.66	0.05	3.15	0.09
	B	06/02/10	(N/A)	552746620	MGBBX	8.14	2.91	(N/A)	3.26	3.24	1.35	-0.17	2.99	-0.24
	C	06/02/10	(N/A)	552746612	MGBDX	8.14	2.90	(N/A)	3.25	3.24	1.35	0.18	3.88	2.88
	I	06/02/10	(N/A)	552746596	MGBJX	8.14	3.91	(N/A)	4.25	4.24	2.36	1.16	4.92	4.80
(M) MFS <sup>®</sup> Government Securities Fund	A	07/25/84	(N/A)	552982100	MFGSX	8.97	3.47	(N/A)	3.07	3.06	0.34	-1.35	1.33	-0.36
	B	08/30/93	(N/A)	552982209	MFGBX	8.57	2.87	(N/A)	2.47	2.46	0.01	-1.62	1.06	-0.83
	C	04/01/96	(N/A)	552982308	MFGDX	8.60	2.87	(N/A)	2.45	2.44	0.01	-1.25	2.04	2.29
	I	01/02/97	(N/A)	552982407	MGSIX	8.57	3.87	(N/A)	3.46	3.44	1.00	-0.27	3.06	4.32
(M) MFS <sup>®</sup> High Income Fund	A	02/17/78	(N/A)	552984106	MHITX	3.24	5.56	(N/A)	5.57	5.56	4.29	2.77	6.58	2.15
	B	09/27/93	(N/A)	552984205	MHIBX	3.10	5.05	(N/A)	5.08	5.06	3.93	2.51	6.46	1.89
	C	01/03/94	(N/A)	552984502	MHICX	3.11	5.05	(N/A)	5.07	5.06	3.96	2.90	7.33	4.89
	I	01/02/97	(N/A)	552984601	MHIIX	3.09	6.05	(N/A)	6.08	6.07	4.97	3.92	8.41	6.94
(M) MFS <sup>®</sup> Income Fund <sup>4</sup>	A	10/29/87	(N/A)	552989105	MFIOX	6.17	4.66	(N/A)	4.55	4.51	2.40	-0.04	3.52	1.16
	B	09/07/93	(N/A)	552989204	MIOBX	5.87	4.12	(N/A)	4.01	3.97	2.08	-0.25	3.32	0.69
	C	09/01/94	(N/A)	552989600	MIOCX	5.86	4.11	(N/A)	4.00	3.96	2.09	0.11	4.25	3.87
	I	01/08/97	(N/A)	552989709	MFIX	5.90	5.11	(N/A)	5.00	4.96	3.09	1.08	5.29	5.91
(Q) MFS <sup>®</sup> Inflation-Adjusted Bond Fund	A	09/30/03	(N/A)	55272P414	MIAAX	9.52	5.29	(N/A)	1.60	1.42	1.61	-0.49	1.61	-0.42
	B	09/01/04	(N/A)	55272P349	MIABX	9.06	4.49	(N/A)	0.94	0.76	1.30	-0.71	1.39	-0.79
	C	09/01/04	(N/A)	55272P331	MIACX	9.02	4.61	(N/A)	0.82	0.74	1.20	-0.47	2.27	2.21
	I	09/30/03	(N/A)	55272P398	MIAIX	9.14	0.06	(N/A)	1.82	1.74	2.20	0.52	3.27	4.25

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- Ⓐ Annually
- Ⓢ Semiannually
- Ⓔ Quarterly
- Ⓜ Monthly

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<b>TAXABLE BOND FUNDS (Continued)</b>														
Ⓜ MFS <sup>®</sup> Limited Maturity Fund	A	02/26/92	(N/A)	55272P109	MLFX	6.02	4.00	(N/A)	3.93	3.78	2.20	1.99	4.31	1.61
	B	09/07/93	(N/A)	55272P406	MLBX	5.86	3.35	(N/A)	3.29	3.13	1.69	1.38	3.49	-0.56
	C	07/01/94	(N/A)	55272P802	MQLCX	5.86	3.26	(N/A)	3.19	3.13	1.57	1.61	4.25	2.16
	I	01/02/97	(N/A)	55272P869	MQLIX	5.84	4.26	(N/A)	4.19	4.13	2.59	2.66	5.36	4.37
Ⓜ MFS <sup>®</sup> Total Return Bond Fund	A	01/04/99	(N/A)	55272P810	MRBFX	9.97	3.73	(N/A)	4.07	3.90	1.66	-0.37	3.17	0.79
	B	12/29/00	(N/A)	55272P794	MRBBX	9.57	3.14	(N/A)	3.50	3.34	1.35	-0.59	2.96	0.48
	C	12/29/00	(N/A)	55272P786	MRBCX	9.56	3.05	(N/A)	3.40	3.34	1.24	-0.35	3.75	3.27
	I	01/04/99	(N/A)	55272P778	MRBIX	9.55	4.05	(N/A)	4.40	4.33	2.25	0.65	4.79	5.43
<b>NATIONAL TAX-EXEMPT BOND FUNDS</b>														
Ⓜ MFS <sup>®</sup> Municipal High Income Fund <sup>N1</sup>	A	02/24/84	(N/A)	552984304	MMHYX	7.81	4.20	7.40	4.28	4.22	2.44	0.23	4.20	3.53
	B	09/07/93	(N/A)	552984403	MMHBX	7.48	3.66	6.18	3.73	3.42	2.11	0.02	3.98	3.18
	C	09/25/98	(N/A)	552984866	MMHCX	7.48	3.39	5.73	3.48	3.42	1.86	0.08	4.63	5.91
	I	06/01/11	(N/A)	552984692	MMIIX	7.47	4.37	7.38	4.47	4.41	2.88	1.10	5.67	7.97
Ⓜ MFS <sup>®</sup> Municipal Income Fund <sup>N1</sup>	A	09/07/93	(N/A)	55273N574	MFIAX	8.55	3.60	6.35	3.72	3.71	1.84	-0.07	2.85	2.64
	B	12/29/86	(N/A)	55273N566	MMIBX	8.20	3.05	5.15	3.15	3.14	1.53	-0.30	2.64	2.41
	C	01/03/94	(N/A)	55273N525	MMICX	8.22	3.02	5.09	3.14	3.13	1.53	0.06	3.57	5.39
	I	08/01/11	(N/A)	55273N434	MIMIX	8.18	4.01	6.77	4.14	4.13	2.53	1.04	4.61	7.46
Ⓜ MFS <sup>®</sup> Municipal Limited Maturity Fund <sup>N1</sup>	A	03/17/92	(N/A)	55272P505	MTLFX	8.26	3.00	5.19	2.97	2.84	1.71	0.98	3.19	2.07
	B	09/07/93	(N/A)	55272P604	MTLBX	8.04	2.33	3.94	2.30	2.18	1.21	0.37	2.35	-0.09
	C	07/01/94	(N/A)	55272P885	MTLCX	8.06	2.23	3.76	2.20	2.17	1.12	0.66	3.23	2.94
	I	08/30/10	(N/A)	55274K504	MTLIX	8.04	3.22	5.44	3.19	3.17	2.12	1.64	4.22	4.84
<b>STATE TAX-EXEMPT BOND FUNDS</b>														
Ⓜ MFS <sup>®</sup> Alabama Municipal Bond Fund <sup>N2,5</sup>	A	02/01/90	(N/A)	55273N301	MFALX	9.87	3.09	5.96	3.30	3.11	1.27	-0.46	2.27	2.72
	B	09/07/93	(N/A)	55273N780	MBABX	9.46	2.48	4.58	2.70	2.51	0.97	-0.68	2.08	2.48
	I	04/01/16	02/01/90 (A)	55273N392	MLALX	9.01	3.47	6.41	3.69	3.50	1.96	0.67	4.05	7.62

<sup>N1</sup> Dividends are generally subject to state and local taxes. For investors subject to the alternative minimum tax, a small portion of dividend income may be taxable. Capital gains distributions, if any, are taxable.

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<b>STATE TAX-EXEMPT BOND FUNDS (Continued)</b>														
(M) MFS® Arkansas Municipal Bond Fund <sup>N2,5</sup>	A	02/03/92	(N/A)	55273N400	MFARX	9.47	3.30	6.24	3.33	3.07	1.40	-0.15	2.11	3.24
	B	09/07/93	(N/A)	55273N772	MBARX	9.08	2.71	4.90	2.74	2.48	1.09	-0.38	1.88	2.89
	I	04/01/16	02/03/92 (A)	55273N426	MARLX	9.01	3.54	6.40	3.57	3.47	1.95	0.83	3.74	7.95
(M) MFS® California Municipal Bond Fund <sup>N2,5</sup>	A	06/18/85	(N/A)	55273N590	MCFTX	5.80	3.54	8.05	3.49	3.31	1.66	-0.36	2.56	3.15
	B	09/07/93	(N/A)	55273N582	MBCAX	5.55	2.96	6.45	2.91	2.73	1.35	-0.59	2.34	2.93
	C	01/03/94	(N/A)	55273N558	MCCAX	5.57	2.82	6.14	2.76	2.73	1.20	-0.38	3.13	5.76
	I	04/01/16	06/18/85 (A)	55273N418	MCAVX	9.03	3.80	8.27	3.75	3.72	2.19	0.61	4.12	7.81
(M) MFS® Georgia Municipal Bond Fund <sup>N2,5</sup>	A	06/06/88	(N/A)	55273N608	MMGAX	10.56	3.08	5.97	3.28	3.22	1.31	-0.27	2.23	3.07
	B	09/07/93	(N/A)	55273N756	MBGAX	10.14	2.48	4.61	2.69	2.62	0.99	-0.53	1.97	2.73
	I	04/01/16	06/06/88 (A)	55273N384	MGATX	9.16	3.46	6.44	3.68	3.62	1.99	0.82	3.97	7.77
(M) MFS® Maryland Municipal Bond Fund <sup>N2,5</sup>	A	10/31/84	(N/A)	55273N707	MFSMX	10.51	3.12	6.10	3.21	3.09	1.49	-0.15	2.44	2.58
	B	09/07/93	(N/A)	55273N723	MBMDX	10.05	2.52	4.72	2.61	2.49	1.18	-0.39	2.18	2.35
	I	04/01/16	10/31/84 (A)	55273N376	MMDIX	9.07	3.51	6.56	3.60	3.48	2.17	0.97	4.15	7.35
(M) MFS® Massachusetts Municipal Bond Fund <sup>N2,5</sup>	A	04/09/85	(N/A)	55273N806	MFSSX	10.64	3.13	6.52	3.27	3.22	1.36	-0.36	2.20	2.34
	B	09/07/93	(N/A)	55273N731	MBMAX	10.21	2.61	5.19	2.68	2.63	1.04	-0.59	1.98	2.09
	I	04/01/16	04/09/85 (A)	55273N368	MTALX	8.92	3.52	7.01	3.66	3.61	2.04	0.77	3.94	7.17
(M) MFS® Mississippi Municipal Bond Fund <sup>N2,5</sup>	A	08/06/92	(N/A)	55273N103	MISSX	9.31	3.24	6.17	3.34	2.97	1.21	-0.36	2.21	2.80
	B	09/07/93	(N/A)	55273N715	MBMSX	8.92	2.74	5.01	2.86	2.38	1.00	-0.52	2.08	2.66
	I	04/01/16	08/06/92 (A)	55273N350	MMSTX	8.89	3.48	6.34	3.59	3.37	1.75	0.60	3.76	7.47
(M) MFS® New York Municipal Bond Fund <sup>N2,5</sup>	A	06/06/88	(N/A)	55273N889	MSNYX	10.54	3.42	7.39	3.48	3.36	1.51	-0.34	2.66	2.91
	B	09/07/93	(N/A)	55273N681	MBNYX	10.06	2.82	5.84	2.89	2.77	1.18	-0.59	2.45	2.69
	C	12/11/00	(N/A)	55273N467	MCNYX	10.08	2.82	5.85	2.89	2.77	1.19	-0.23	3.42	5.79
	I	04/01/16	06/06/88 (A)	55273N343	MNYLX	8.93	3.81	7.88	3.88	3.76	2.20	0.78	4.45	7.88
(M) MFS® North Carolina Municipal Bond Fund <sup>N2,5</sup>	A	10/31/84	(N/A)	55273N871	MSNCX	11.33	3.16	6.01	3.31	3.30	1.36	-0.21	2.27	2.78
	B	09/07/93	(N/A)	55273N699	MBNCX	10.83	2.57	4.67	2.72	2.71	1.04	-0.46	2.01	2.56
	C	01/03/94	(N/A)	55273N541	MCNCX	10.84	2.56	4.67	2.72	2.70	1.04	-0.08	2.99	5.56
	I	04/01/16	10/31/84 (A)	55273N335	MNCLX	9.04	3.55	6.46	3.71	3.69	2.05	0.89	4.01	7.57

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<b>STATE TAX-EXEMPT BOND FUNDS (Continued)</b>														
(m) MFS <sup>®</sup> Pennsylvania Municipal Bond Fund <sup>N2,5</sup>	A	02/01/93	(N/A)	55273N798	MFPAX	10.03	3.36	6.25	3.57	3.33	1.74	-0.13	2.60	2.78
	B	09/07/93	(N/A)	55273N673	MBPAX	9.62	2.77	4.94	2.99	2.75	1.42	-0.36	2.35	2.54
	I	04/01/16	02/01/93 (A)	55273N327	MPALX	9.14	3.61	6.42	3.83	3.74	2.28	0.83	4.16	7.40
(m) MFS <sup>®</sup> South Carolina Municipal Bond Fund <sup>N2,5</sup>	A	10/31/84	(N/A)	55273N863	MFSCX	11.59	3.32	6.54	3.48	3.43	1.21	-0.39	2.25	2.86
	B	09/07/93	(N/A)	55273N665	MBSCX	11.09	2.72	5.13	2.89	2.84	0.90	-0.64	1.99	2.63
	I	04/01/16	10/31/84 (A)	55273N319	MTSCX	8.99	3.70	6.98	3.88	3.84	1.89	0.71	3.99	7.63
(m) MFS <sup>®</sup> Virginia Municipal Bond Fund <sup>N2,5</sup>	A	10/31/84	(N/A)	55273N830	MSVAX	10.74	3.07	6.01	3.29	3.21	1.33	-0.37	2.10	2.72
	B	09/07/93	(N/A)	55273N632	MBVAX	10.27	2.47	4.62	2.69	2.61	1.00	-0.61	1.87	2.49
	C	01/03/94	(N/A)	55273N533	MVACX	10.28	2.47	4.61	2.69	2.61	1.01	-0.22	2.82	5.49
	I	04/01/16	10/31/84 (A)	55273N285	MIVAX	8.93	3.46	6.47	3.69	3.61	2.01	0.74	3.83	7.55
(m) MFS <sup>®</sup> West Virginia Municipal Bond Fund <sup>N2,5</sup>	A	10/31/84	(N/A)	55273N822	MFVWX	10.64	3.12	5.98	3.28	3.10	1.36	-0.11	2.17	2.81
	B	09/07/93	(N/A)	55273N616	MBVWX	10.18	2.51	4.62	2.68	2.50	1.04	-0.37	1.94	2.58
	I	04/01/16	10/31/84 (A)	55273N277	MWVIX	8.97	3.52	6.47	3.67	3.49	2.05	1.00	3.95	7.60

<sup>N2</sup> A small portion of income may be subject to state, federal, and/or alternative minimum tax. Capital gains, if any, are subject to a capital gains tax.

Performance data shown represent past performance and are no guarantee of future results. Investment return and principal value fluctuate so your shares, when sold, may be worth more or less than the original cost; current performance may be lower or higher than quoted. For most recent month-end performance, please visit [mfs.com](http://mfs.com).

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## Important Fund Performance Calculation and Regulatory Information

Class A shares are subject to a maximum front-end sales charge of 5.75% and 4.25%, for equity and income funds, respectively (4.25% for Lifetime Income Fund and Diversified Income Fund, 2.50% for Limited Maturity Fund and Municipal Limited Maturity Fund). Class B results include the applicable CDSC, which declines over six years from 4% to 0%. Class C results have no initial sales charge but if the shares are redeemed within one year from the end of the prior month of purchase, they may be subject to a 1% CDSC. Class I shares ("I") have no sales charge or Rule 12b-1 fees and are available only to eligible investors. Class I shares are available without a sales charge to eligible investors.

**Effective June 1, 2019, B shares will be closed to new purchases from new and existing investors.**

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.

Taxable equivalent yields are based on the maximum federal and, if applicable, maximum state rates including any city, county, or local taxes. The combined federal and state rate assumes itemization of state tax deductions. Please note that the full tax exemption will apply only to residents of the state to which the fund's name refers.

<sup>1</sup> Performance information prior to June 15, 2021 reflects time periods when the fund did not have an investment strategy of allocating a portion of its assets to investment grade quality debt instruments. The fund's investment strategies changed effective June 15, 2021.

<sup>2</sup> Performance information prior to December 1, 2014, reflects time periods when the fund had (i) a policy of focusing its investments on debt instruments of U.S. and foreign governments and (ii) a policy permitting the fund to invest up to 100% of its assets in less than investment grade quality debt instruments (lower quality debt instruments). The fund's investment policies and strategies changed effective December 1, 2014.

<sup>3</sup> Performance information prior to April 30, 2021, reflects time periods when the fund (i) had a policy of primarily investing in investment grade quality debt instruments and (ii) did not have a policy to engage in a currency hedging strategy to primarily expose the fund to the U.S. dollar. The fund's investment policies and strategies changed effective April 30, 2021.

<sup>4</sup> Performance information prior to December 2, 2019 reflects time periods when the fund had (i) a policy permitting the fund to invest up to 100% of its assets in below investment grade quality debt instruments and (ii) a policy permitting the fund to invest in equity securities as a principal investment strategy. The fund's investment policies and strategies changed effective December 2, 2019.

<sup>5</sup> Performance for Class I shares includes the performance of the fund's Class A shares, adjusted to take into account differences in sales loads and class-specific operating expenses (such as 12b-1 fees), if any, for periods prior to their offering. Please see the prospectus for additional information about performance and expenses.

The distribution rates are computed by annualizing the current distribution rate per share (excluding short-term capital gains), and dividing the result by the public offering price (for the distribution rate including sales charge) or net asset value (for the distribution rate not including sales charge) at the end of the business day stated above.

SEC yield is based on the yield of a fund's investments over a 30-day period and not on the dividend paid by the fund, which may differ.

**This publication is authorized for distribution only when preceded or accompanied by a prospectus, or summary prospectus, for the portfolio being offered. Consider the fund's investment objectives, risks, charges and expenses. Contact MFS or view online at MFS.com. Read it carefully.**