

As of May 31, 2026



# Class A MFS<sup>®</sup> Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Data	
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*				
<b>STOCK FUNDS</b>																		
(a)	Massachusetts Investors Growth Stock Fund	01/01/35	(N/A)	MIGFX	5.75	13.67	7.86	12.94	10.00	-0.65	13.00	6.59	10.73	3.68	-6.36	0.71	0.71	—
(a)	Massachusetts Investors Trust	07/15/24	(N/A)	MITTX	5.75	13.24	10.20	18.40	20.97	7.88	12.57	8.90	16.09	14.01	1.68	0.69	0.69	—
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Core Equity Fund	08/07/97	(N/A)	MUEAX	5.75	14.39	13.92	23.17	26.77	10.16	13.71	12.58	20.77	19.48	3.82	0.66	0.65	01/31/27
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWAX	5.75	16.86	14.81	27.03	28.27	9.06	16.17	13.45	24.54	20.89	2.79	0.68	0.64	09/30/26
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Mid Cap Equity Fund	08/19/16	(N/A)	BMSFX	5.75	11.64	10.15	19.61	20.79	12.42	10.97	8.85	17.27	13.85	5.95	0.92	0.84	09/30/26
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Small Cap Equity Fund	09/15/15	(N/A)	BRS DX	5.75	9.34	5.09	14.90	32.41	13.90	8.70	3.85	12.65	24.80	7.35	1.13	0.99	09/30/26
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Value Equity Fund	09/15/15	(N/A)	BRUDX	5.75	11.45	11.19	19.58	26.71	13.83	10.79	9.88	17.24	19.43	7.29	0.69	0.64	09/30/26
(a)	MFS <sup>®</sup> Core Equity Fund <sup>E1</sup>	01/02/96	(N/A)	M RG AX	5.75	14.12	10.47	18.58	20.31	7.61	13.45	9.17	16.27	13.39	1.42	0.89	0.88	12/31/26
(q)	MFS <sup>®</sup> Equity Income Fund	09/27/12	(N/A)	EQNAX	5.75	12.50	11.93	19.56	28.40	13.28	11.84	10.61	17.22	21.02	6.77	0.93	0.89	11/30/26
(a)	MFS <sup>®</sup> Growth Fund	09/13/93	(N/A)	MFE GX	5.75	15.84	10.75	21.62	17.64	5.34	15.16	9.45	19.25	10.88	-0.72	0.87	0.86	03/31/27
(a)	MFS <sup>®</sup> Intrinsic Equity Fund	02/08/22	(N/A)	UIV VX	5.75	7.73	—	12.92	9.92	0.32	6.26	—	10.71	3.60	-5.45	5.96	0.94	11/30/26
(q)	MFS <sup>®</sup> Low Volatility Equity Fund	12/05/13	(N/A)	MLV AX	5.75	10.50	7.65	11.94	8.28	1.91	9.85	6.38	9.75	2.06	-3.95	0.93	0.89	12/31/26
(a)	MFS <sup>®</sup> Mid Cap Growth Fund	12/01/93	(N/A)	OTC AX	5.75	11.35	3.64	11.94	4.56	3.80	10.69	2.42	9.75	-1.45	-2.17	1.03	1.02	12/31/26
(a)	MFS <sup>®</sup> Mid Cap Value Fund	08/31/01	(N/A)	MVC AX	5.75	9.84	7.55	14.56	17.02	7.95	9.19	6.28	12.32	10.29	1.74	0.98	0.97	01/31/27
(a)	MFS <sup>®</sup> New Discovery Fund	01/02/97	(N/A)	MND AX	5.75	11.37	0.52	13.75	27.35	10.83	10.71	-0.67	11.53	20.03	4.46	1.28	1.21	12/31/26
(a)	MFS <sup>®</sup> New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDV AX	5.75	10.11	4.78	12.25	18.88	8.91	9.46	3.55	10.06	12.05	2.65	1.22	1.21	06/30/26
(a)	MFS <sup>®</sup> Research Fund	10/13/71	(N/A)	MFR FX	5.75	13.26	9.96	17.95	20.26	6.59	12.59	8.67	15.65	13.35	0.46	0.76	0.75	01/31/27
(a)	MFS <sup>®</sup> Technology Fund	01/02/97	(N/A)	MTC AX	5.75	19.86	15.03	31.86	40.98	18.72	19.15	13.68	29.29	32.88	11.90	1.12	1.11	12/31/26
(m)	MFS <sup>®</sup> Total Return Fund	10/06/70	(N/A)	MSFR X	5.75	7.30	4.94	10.54	11.42	2.87	6.67	3.71	8.38	5.01	-3.05	0.72	0.72	—
(q)	MFS <sup>®</sup> Utilities Fund	02/14/92	(N/A)	MMUF X	5.75	8.80	7.82	11.19	14.62	6.35	8.16	6.55	9.02	8.03	0.24	1.02	1.01	02/28/27
(q)	MFS <sup>®</sup> Value Fund	01/02/96	(N/A)	MEI AX	5.75	9.74	7.48	13.86	13.01	4.41	9.09	6.21	11.63	6.51	-1.59	0.80	0.79	12/31/26

\* Periods less than one year are actual, not annualized.

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

**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.**

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.

Class A shares ("A") results include the maximum sales charge.

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As of May 31, 2026



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					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>ASSET ALLOCATION STRATEGIES</b>																	
(a) MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MAAGX	5.75	10.84	7.38	15.63	17.67	7.68	10.19	6.11	13.37	10.90	1.48	1.00	1.00	—
(q) MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACFX	5.75	5.89	3.65	8.90	9.59	3.30	5.27	2.43	6.77	3.29	-2.64	0.83	0.83	—
(m) MFS® Diversified Income Fund <sup>2</sup>	05/26/06	(N/A)	DIFAX	4.25	4.96	3.64	9.13	11.48	4.89	4.50	2.74	7.57	6.74	0.43	0.96	0.89	06/30/26
(a) MFS® Global Alternative Strategy Fund <sup>3</sup>	12/20/07	(N/A)	DVRAX	5.75	4.66	4.99	8.62	4.14	0.49	4.05	3.76	6.50	-1.85	-5.28	1.51	1.30	02/28/27
(a) MFS® Growth Allocation Fund	06/28/02	(N/A)	MAGWX	5.75	9.48	6.37	13.78	15.22	6.26	8.84	5.12	11.56	8.60	0.15	0.95	0.94	09/30/26
(a) MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTAX	5.75	7.74	4.79	10.59	11.64	4.30	7.10	3.55	8.42	5.22	-1.69	0.92	0.73	08/31/26
(a) MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFEAX	5.75	9.35	6.46	13.50	15.17	6.09	8.70	5.21	11.28	8.55	-0.01	0.98	0.77	08/31/26
(a) MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFAX	5.75	10.33	7.84	15.92	18.90	8.12	9.68	6.57	13.66	12.06	1.91	1.01	0.81	08/31/26
(a) MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMAX	5.75	10.74	8.30	16.77	20.35	9.07	10.09	7.02	14.49	13.43	2.80	1.04	0.81	08/31/26
(a) MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFSX	5.75	10.92	8.63	17.43	21.59	9.83	10.26	7.36	15.13	14.60	3.51	1.05	0.82	08/31/26
(a) MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFIAX	5.75	10.92	8.65	17.42	21.67	9.89	10.26	7.37	15.13	14.68	3.57	1.08	0.82	08/31/26
(a) MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJAX	5.75	11.14	8.60	17.39	21.69	9.89	10.45	7.32	15.09	14.69	3.57	1.16	0.82	08/31/26
(a) MFS® Lifetime® 2065 Fund	09/01/21	(N/A)	LFTFX	5.75	7.94	—	17.44	21.66	9.88	6.61	—	15.15	14.66	3.56	2.03	0.82	08/31/26
(m) MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLAX	4.25	5.01	3.49	8.28	9.51	3.45	4.56	2.60	6.72	4.85	-0.94	0.88	0.69	08/31/26
(a) MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWAX	5.75	3.71	3.70	6.18	4.03	1.28	3.09	2.48	4.10	-1.95	-4.55	1.91	1.39	09/30/26
(q) MFS® Moderate Allocation Fund	06/28/02	(N/A)	MAMAX	5.75	7.70	4.95	11.38	12.43	4.75	7.06	3.71	9.20	5.96	-1.27	0.89	0.89	—

\* Periods less than one year are actual, not annualized.

<sup>2</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>3</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

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					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>GLOBAL/INTERNATIONAL FUNDS</b>																	
(a) MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKAX	5.75	11.49	10.01	27.53	58.51	27.92	10.83	8.72	25.04	49.40	20.56	1.27	0.85	12/31/27
(a) MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXAX	5.75	11.44	12.27	25.35	39.27	15.78	10.79	10.95	22.90	31.26	9.13	0.78	0.77	12/31/26
(a) MFS® Emerging Markets Equity Fund	10/24/95	(N/A)	MEMAX	5.75	9.21	6.37	23.28	44.43	18.59	8.56	5.11	20.87	36.12	11.77	1.35	1.31	09/30/26
(a) MFS® Emerging Markets Equity Research Fund	02/23/21	(N/A)	EEMPX	5.75	5.95	6.73	22.40	49.90	24.16	4.76	5.47	20.01	41.28	17.02	10.09	1.31	11/30/26
(a) MFS® Global Equity Fund	09/07/93	(N/A)	MWEFX	5.75	8.44	3.27	9.37	8.20	0.72	7.80	2.06	7.24	1.98	-5.07	1.22	1.17	02/28/27
(a) MFS® Global Growth Fund	11/18/93	(N/A)	MWOFX	5.75	10.47	3.96	8.80	3.65	-2.43	9.82	2.74	6.67	-2.31	-8.04	1.31	1.22	02/28/27
(a) MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNAX	5.75	8.30	1.54	10.01	9.23	7.59	7.66	0.34	7.86	2.95	1.41	1.76	1.35	12/31/26
(a) MFS® Global Real Estate Fund	03/11/09	(N/A)	MGLAX	5.75	4.51	-0.25	6.23	8.02	6.85	3.90	-1.43	4.15	1.81	0.71	1.19	1.18	12/31/26
(q) MFS® Global Total Return Fund	09/04/90	(N/A)	MFWTX	5.75	6.47	4.77	11.40	14.29	5.46	5.84	3.53	9.22	7.72	-0.61	1.20	1.09	02/28/27
(a) MFS® International Diversification Fund	09/30/04	(N/A)	MDIDX	5.75	9.65	6.76	16.81	22.45	9.41	9.00	5.50	14.52	15.41	3.12	1.10	1.08	09/30/26
(a) MFS® International Equity Fund <sup>A1</sup>	02/08/23	01/31/96 (R6)	MIEJX	5.75	9.64	6.94	12.82	10.94	3.63	8.99	5.68	10.62	4.56	-2.33	0.99	0.98	10/31/26
(a) MFS® International Growth Fund	10/24/95	(N/A)	MGRAX	5.75	9.76	6.03	13.03	11.57	3.79	9.11	4.78	10.82	5.16	-2.17	1.07	1.06	09/30/26
(a) MFS® International Intrinsic Equity Fund <sup>S2</sup>	10/24/95	(N/A)	MGIAX	5.75	10.13	7.71	18.21	21.44	6.81	9.48	6.44	15.90	14.46	0.67	1.03	1.02	09/30/26
(a) MFS® International Large Cap Value Fund	06/30/20	(N/A)	MKVBX	5.75	15.81	11.59	21.64	28.26	10.07	14.65	10.28	19.26	20.89	3.74	0.99	0.96	09/30/27
(a) MFS® International New Discovery Fund <sup>S3</sup>	10/09/97	(N/A)	MIDAX	5.75	6.52	2.84	10.97	12.29	7.52	5.90	1.63	8.80	5.84	1.34	1.29	1.28	01/31/27
(q) MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGAX	5.75	9.17	8.52	13.57	11.05	3.43	8.53	7.24	11.35	4.66	-2.52	1.02	0.99	12/31/26
(a) MFS® Research International Fund	01/02/97	(N/A)	MRSAX	5.75	8.49	5.39	13.51	16.95	8.65	7.85	4.15	11.29	10.22	2.40	1.00	0.99	12/31/26

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<sup>A1</sup> Performance for Class A shares for periods prior to their offering is derived from the performance of the fund's Class R6 shares, adjusted to take into account differences in sales loads and class-specific operating expenses, such as Rule 12b-1 fees and certain shareholder servicing (including sub-accounting) costs, if any. In addition, the performance shown for Class A shares for periods prior to their offering does not reflect any applicable fee reductions and waivers and expense reimbursements that were in effect prior to the offering of Class A shares. Please see the prospectus for additional information about performance and expenses.

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<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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<b>BOND FUNDS</b>																	
(m) MFS® Core Bond Fund	06/22/22	(N/A)	MCBEX	4.25	3.19	—	4.00	4.94	0.34	2.06	—	2.50	0.48	-3.92	1.51	0.64	08/31/26
(m) MFS® Corporate Bond Fund	05/08/74	(N/A)	MFBFX	4.25	2.68	0.51	5.42	5.87	0.69	2.24	-0.36	3.91	1.37	-3.59	0.77	0.76	08/31/26
(m) MFS® Emerging Markets Debt Fund	03/17/98	(N/A)	MEDAX	4.25	3.86	2.55	10.06	12.08	2.18	3.41	1.67	8.48	7.32	-2.16	1.08	1.07	11/30/26
(m) MFS® Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLAX	4.25	3.51	2.30	7.50	9.99	1.04	3.06	1.42	5.96	5.31	-3.26	1.25	1.11	02/28/27
(m) MFS® Global High Yield Fund	07/01/98	(N/A)	MHOAX	4.25	4.97	4.08	9.09	7.37	1.59	4.52	3.18	7.53	2.81	-2.73	1.27	1.02	05/31/27
(m) MFS® Global Opportunistic Bond Fund <sup>4</sup>	06/02/10	(N/A)	MGBAX	4.25	2.10	0.92	4.65	4.54	0.66	1.66	0.05	3.15	0.09	-3.62	0.95	0.94	03/31/27
(m) MFS® Government Securities Fund	07/25/84	(N/A)	MFGSX	4.25	0.77	-0.49	2.81	4.06	-0.04	0.34	-1.35	1.33	-0.36	-4.29	0.78	0.77	06/30/26
(m) MFS® High Income Fund	02/17/78	(N/A)	MHITX	4.25	4.74	3.66	8.14	6.68	0.97	4.29	2.77	6.58	2.15	-3.32	0.86	0.85	05/31/27
(m) MFS® Income Fund <sup>5</sup>	10/29/87	(N/A)	MFOIX	4.25	2.85	0.83	5.03	5.65	0.62	2.40	-0.04	3.52	1.16	-3.66	0.80	0.73	02/28/27
(q) MFS® Inflation-Adjusted Bond Fund	09/30/03	(N/A)	MIAAX	4.25	2.05	0.38	3.10	4.00	1.33	1.61	-0.49	1.61	-0.42	-2.97	0.83	0.65	02/28/27
(m) MFS® Limited Maturity Fund	02/26/92	(N/A)	MQLFX	2.50	2.46	2.51	5.20	4.21	1.02	2.20	1.99	4.31	1.61	-1.51	0.74	0.58	08/31/26
(m) MFS® Municipal High Income Fund	02/24/84	(N/A)	MMHYX	4.25	2.89	1.11	5.72	8.12	2.51	2.44	0.23	4.20	3.53	-1.84	0.73	0.66	05/31/27
(m) MFS® Municipal Income Fund	09/07/93	(N/A)	MFIAX	4.25	2.28	0.80	4.35	7.20	1.68	1.84	-0.07	2.85	2.64	-2.64	0.77	0.76	07/31/26
(m) MFS® Municipal Intermediate Fund	05/18/21	(N/A)	MIUAX	4.25	1.47	1.42	4.46	6.49	1.22	0.60	0.55	2.95	1.96	-3.08	0.84	0.70	07/31/26
(m) MFS® Municipal Limited Maturity Fund	03/17/92	(N/A)	MTLFX	2.50	1.97	1.49	4.07	4.69	0.78	1.71	0.98	3.19	2.07	-1.74	0.72	0.59	08/31/26
(m) MFS® Total Return Bond Fund	01/04/99	(N/A)	MRBFX	4.25	2.10	0.50	4.67	5.27	0.55	1.66	-0.37	3.17	0.79	-3.72	0.77	0.60	08/31/26

\* Periods less than one year are actual, not annualized.

<sup>4</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>5</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>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

**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.**

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Class A shares ("A") results include the maximum sales charge.

As of May 31, 2026



# Class A MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>STATE TAX-ADVANTAGED BOND FUNDS**</b>																	
(m) MFS® Alabama Municipal Bond Fund	02/01/90	(N/A)	MFALX	4.25	1.71	0.41	3.76	7.28	1.66	1.27	-0.46	2.27	2.72	-2.66	1.08	0.90	07/31/26
(m) MFS® Arkansas Municipal Bond Fund	02/03/92	(N/A)	MFARX	4.25	1.85	0.72	3.60	7.82	1.33	1.40	-0.15	2.11	3.24	-2.98	0.95	0.70	07/31/26
(m) MFS® California Municipal Bond Fund	06/18/85	(N/A)	MCCTX	4.25	2.11	0.51	4.06	7.73	1.87	1.66	-0.36	2.56	3.15	-2.46	0.84	0.65	07/31/26
(m) MFS® Georgia Municipal Bond Fund	06/06/88	(N/A)	MMGAX	4.25	1.75	0.60	3.73	7.64	1.74	1.31	-0.27	2.23	3.07	-2.58	0.99	0.90	07/31/26
(m) MFS® Maryland Municipal Bond Fund	10/31/84	(N/A)	MFSMX	4.25	1.94	0.72	3.93	7.14	1.56	1.49	-0.15	2.44	2.58	-2.76	1.01	0.85	07/31/26
(m) MFS® Massachusetts Municipal Bond Fund	04/09/85	(N/A)	MFSSX	4.25	1.80	0.51	3.69	6.88	1.66	1.36	-0.36	2.20	2.34	-2.67	0.88	0.82	07/31/26
(m) MFS® Mississippi Municipal Bond Fund	08/06/92	(N/A)	MISSX	4.25	1.65	0.51	3.70	7.36	1.64	1.21	-0.36	2.21	2.80	-2.68	1.07	0.76	07/31/26
(m) MFS® New York Municipal Bond Fund	06/06/88	(N/A)	MSNYX	4.25	1.95	0.52	4.16	7.48	1.89	1.51	-0.34	2.66	2.91	-2.44	0.96	0.83	07/31/26
(m) MFS® North Carolina Municipal Bond Fund	10/31/84	(N/A)	MSNCX	4.25	1.80	0.67	3.76	7.35	1.84	1.36	-0.21	2.27	2.78	-2.49	0.86	0.84	07/31/26
(m) MFS® Pennsylvania Municipal Bond Fund	02/01/93	(N/A)	MFPAX	4.25	2.18	0.74	4.10	7.34	1.77	1.74	-0.13	2.60	2.78	-2.55	0.95	0.69	07/31/26
(m) MFS® South Carolina Municipal Bond Fund	10/31/84	(N/A)	MFSCX	4.25	1.65	0.48	3.74	7.42	1.81	1.21	-0.39	2.25	2.86	-2.51	0.91	0.84	07/31/26
(m) MFS® Virginia Municipal Bond Fund	10/31/84	(N/A)	MSVAX	4.25	1.77	0.50	3.59	7.28	1.53	1.33	-0.37	2.10	2.72	-2.78	0.90	0.82	07/31/26
(m) MFS® West Virginia Municipal Bond Fund	10/31/84	(N/A)	MFVVX	4.25	1.80	0.76	3.66	7.37	1.64	1.36	-0.11	2.17	2.81	-2.68	1.02	0.87	07/31/26

\* Periods less than one year are actual, not annualized.

\*\* 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.

<sup>E1</sup> **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 contractual reductions will continue until last date noted under the "Waiver End Date" column.

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Class A shares ("A") results include the maximum sales charge.

As of May 31, 2026



# Class A MFS<sup>®</sup> Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges											Expense Ratios (%) <sup>E1</sup>		
			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>STOCK FUNDS</b>																
Massachusetts Investors Growth Stock Fund	01/01/35	(N/A)	MIGFX	6.16	28.69	0.77	39.91	22.43	26.20	-19.24	24.08	16.33	9.88	0.71	0.71	—
Massachusetts Investors Trust	07/15/24	(N/A)	MITTX	8.77	23.56	-5.31	31.91	14.12	26.82	-16.34	19.15	19.68	13.57	0.69	0.69	—
MFS <sup>®</sup> Blended Research <sup>®</sup> Core Equity Fund	08/07/97	(N/A)	MUEAX	8.12	20.34	-8.05	28.44	15.10	29.03	-16.25	27.96	24.90	15.80	0.66	0.65	01/31/27
MFS <sup>®</sup> Blended Research <sup>®</sup> Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWAX	6.38	26.56	-5.11	32.01	30.47	28.64	-29.97	40.78	35.29	16.62	0.68	0.64	09/30/26
MFS <sup>®</sup> Blended Research <sup>®</sup> Mid Cap Equity Fund	08/19/16	(N/A)	BMSFX	—	18.81	-11.41	29.97	10.10	26.43	-13.93	19.41	19.04	7.76	0.92	0.84	09/30/26
MFS <sup>®</sup> Blended Research <sup>®</sup> Small Cap Equity Fund	09/15/15	(N/A)	BRSDX	20.01	13.52	-5.67	25.92	1.85	28.74	-18.63	18.49	4.60	5.52	1.13	0.99	09/30/26
MFS <sup>®</sup> Blended Research <sup>®</sup> Value Equity Fund	09/15/15	(N/A)	BRUDX	13.85	16.36	-8.58	23.00	1.44	25.90	-4.37	14.26	12.63	15.01	0.69	0.64	09/30/26
MFS <sup>®</sup> Core Equity Fund <sup>F1</sup>	01/02/96	(N/A)	MRGAX	11.09	24.46	-4.11	32.73	18.55	25.08	-17.19	22.86	20.07	12.38	0.89	0.88	12/31/26
MFS <sup>®</sup> Equity Income Fund	09/27/12	(N/A)	EQNAX	10.40	19.64	-7.73	25.44	8.32	25.97	-7.12	15.92	12.65	16.91	0.93	0.89	11/30/26
MFS <sup>®</sup> Growth Fund	09/13/93	(N/A)	MFE GX	2.21	30.54	2.34	37.35	31.30	23.34	-31.32	35.79	31.34	12.03	0.87	0.86	03/31/27
MFS <sup>®</sup> Intrinsic Equity Fund	02/08/22	(N/A)	UIV VX	—	—	—	—	—	—	—	24.62	10.36	12.25	5.96	0.94	11/30/26
MFS <sup>®</sup> Low Volatility Equity Fund	12/05/13	(N/A)	MLV AX	9.77	16.53	-1.41	26.83	11.33	25.16	-10.86	12.12	13.68	9.87	0.93	0.89	12/31/26
MFS <sup>®</sup> Mid Cap Growth Fund	12/01/93	(N/A)	OTC AX	4.33	25.99	0.85	37.43	35.33	13.74	-28.53	21.00	14.41	3.39	1.03	1.02	12/31/26
MFS <sup>®</sup> Mid Cap Value Fund	08/31/01	(N/A)	MVC AX	15.38	13.38	-11.66	30.54	4.03	30.50	-8.97	12.51	13.66	6.11	0.98	0.97	01/31/27
MFS <sup>®</sup> New Discovery Fund	01/02/97	(N/A)	MND AX	8.59	26.08	-1.65	40.78	44.63	1.26	-29.81	13.98	6.05	12.37	1.28	1.21	12/31/26
MFS <sup>®</sup> New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDV AX	26.13	14.65	-11.34	33.27	3.40	33.45	-11.07	10.94	9.10	2.19	1.22	1.21	06/30/26
MFS <sup>®</sup> Research Fund	10/13/71	(N/A)	MFR FX	8.73	23.35	-4.49	33.10	16.63	24.71	-17.26	22.46	18.80	12.82	0.76	0.75	01/31/27
MFS <sup>®</sup> Technology Fund	01/02/97	(N/A)	MTC AX	8.16	38.47	1.59	35.76	46.04	13.37	-36.20	53.89	36.47	16.09	1.12	1.11	12/31/26
MFS <sup>®</sup> Total Return Fund	10/06/70	(N/A)	MSFR X	8.87	12.16	-5.78	20.20	9.71	13.98	-9.66	10.31	7.61	10.98	0.72	0.72	—
MFS <sup>®</sup> Utilities Fund	02/14/92	(N/A)	MMU FX	11.40	14.68	0.85	24.89	6.02	13.85	0.44	-2.25	11.40	14.84	1.02	1.01	02/28/27
MFS <sup>®</sup> Value Fund	01/02/96	(N/A)	MEI AX	13.86	17.45	-10.07	29.74	3.66	25.08	-6.13	7.89	11.64	12.87	0.80	0.79	12/31/26

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of May 31, 2026



# Class A MFS<sup>®</sup> Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges											Expense Ratios (%) <sup>E1</sup>		
			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>ASSET ALLOCATION STRATEGIES</b>																
MFS <sup>®</sup> Aggressive Growth Allocation Fund	06/28/02	(N/A)	MAAGX	7.24	22.92	-6.97	29.67	15.48	18.89	-17.09	15.98	11.81	14.88	1.00	1.00	—
MFS <sup>®</sup> Conservative Allocation Fund	06/28/02	(N/A)	MACFX	5.42	10.78	-3.10	17.09	11.59	7.85	-13.48	10.44	6.56	9.54	0.83	0.83	—
MFS <sup>®</sup> Diversified Income Fund <sup>2</sup>	05/26/06	(N/A)	DIFAX	8.49	8.64	-3.69	17.38	2.15	9.30	-13.01	9.23	5.14	9.34	0.96	0.89	06/30/26
MFS <sup>®</sup> Global Alternative Strategy Fund <sup>3</sup>	12/20/07	(N/A)	DVRAX	-3.73	6.18	-0.71	12.81	4.42	3.43	-5.46	8.95	9.45	10.60	1.51	1.30	02/28/27
MFS <sup>®</sup> Growth Allocation Fund	06/28/02	(N/A)	MAGWX	7.56	18.90	-5.87	26.26	14.46	15.70	-16.08	14.61	10.40	13.35	0.95	0.94	09/30/26
MFS <sup>®</sup> Lifetime <sup>®</sup> 2030 Fund	09/29/05	(N/A)	MLTAX	8.60	16.91	-5.96	21.73	11.62	12.45	-13.99	12.16	8.13	10.47	0.92	0.73	08/31/26
MFS <sup>®</sup> Lifetime <sup>®</sup> 2035 Fund	11/02/12	(N/A)	LFEAX	8.87	19.13	-7.28	24.76	12.61	16.89	-15.02	14.55	10.31	12.87	0.98	0.77	08/31/26
MFS <sup>®</sup> Lifetime <sup>®</sup> 2040 Fund	09/29/05	(N/A)	MLFAX	8.73	20.47	-7.82	25.86	12.88	18.59	-15.48	16.01	12.06	14.82	1.01	0.81	08/31/26
MFS <sup>®</sup> Lifetime <sup>®</sup> 2045 Fund	11/02/12	(N/A)	LTMAX	8.81	20.87	-8.12	26.44	13.01	19.92	-15.70	16.32	12.60	15.40	1.04	0.81	08/31/26
MFS <sup>®</sup> Lifetime <sup>®</sup> 2050 Fund	09/15/10	(N/A)	MFFSX	8.80	20.86	-8.12	26.49	13.01	20.11	-15.87	16.55	12.92	15.97	1.05	0.82	08/31/26
MFS <sup>®</sup> Lifetime <sup>®</sup> 2055 Fund	11/02/12	(N/A)	LFIAX	8.74	20.93	-8.21	26.47	13.05	20.13	-15.82	16.51	12.90	15.99	1.08	0.82	08/31/26
MFS <sup>®</sup> Lifetime <sup>®</sup> 2060 Fund	12/06/16	(N/A)	MFJAX	—	20.92	-8.16	26.58	13.23	20.10	-15.97	16.51	12.99	15.82	1.16	0.82	08/31/26
MFS <sup>®</sup> Lifetime <sup>®</sup> 2065 Fund	09/01/21	(N/A)	LFTFX	—	—	—	—	—	—	-16.13	16.58	12.98	15.87	2.03	0.82	08/31/26
MFS <sup>®</sup> Lifetime <sup>®</sup> Income Fund	09/29/05	(N/A)	MLLAX	5.03	8.05	-2.64	13.52	9.87	6.29	-11.76	9.34	5.97	8.94	0.88	0.69	08/31/26
MFS <sup>®</sup> Managed Wealth Fund	06/27/14	(N/A)	MNWAX	-1.16	6.67	1.95	8.67	2.85	1.13	-2.33	5.18	6.10	7.50	1.91	1.39	09/30/26
MFS <sup>®</sup> Moderate Allocation Fund	06/28/02	(N/A)	MAMAX	6.47	14.81	-4.46	21.73	13.61	11.70	-15.20	12.49	8.40	11.71	0.89	0.89	—

<sup>2</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>3</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of May 31, 2026



# Class A MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges											Expense Ratios (%) <sup>E1</sup>		
			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>GLOBAL/INTERNATIONAL FUNDS</b>																
MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKAX	14.43	38.74	-16.66	18.75	9.73	3.42	-19.26	9.56	13.89	33.44	1.27	0.85	12/31/27
MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXAX	1.32	26.84	-15.78	21.78	8.88	13.23	-13.59	14.01	11.64	39.58	0.78	0.77	12/31/26
MFS® Emerging Markets Equity Fund	10/24/95	(N/A)	MEMAX	8.60	37.38	-14.02	19.78	10.17	-6.98	-20.11	10.88	10.98	33.48	1.35	1.31	09/30/26
MFS® Emerging Markets Equity Research Fund	02/23/21	(N/A)	EEMPX	—	—	—	—	—	—	-22.47	8.91	7.03	30.66	10.09	1.31	11/30/26
MFS® Global Equity Fund	09/07/93	(N/A)	MWEFX	7.07	23.62	-9.82	30.22	13.87	17.04	-17.95	14.21	5.48	13.40	1.22	1.17	02/28/27
MFS® Global Growth Fund	11/18/93	(N/A)	MWOFX	5.08	31.38	-4.94	35.35	20.23	18.36	-19.30	20.60	10.68	7.13	1.31	1.22	02/28/27
MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNAX	6.59	29.42	-8.56	30.27	23.59	11.86	-27.07	18.15	2.33	8.12	1.76	1.35	12/31/26
MFS® Global Real Estate Fund	03/11/09	(N/A)	MGLAX	7.23	12.64	-3.92	26.04	1.88	29.47	-27.20	10.92	-3.11	3.37	1.19	1.18	12/31/26
MFS® Global Total Return Fund	09/04/90	(N/A)	MFWTX	5.28	15.14	-7.18	18.24	9.30	8.27	-10.82	10.26	3.96	15.68	1.20	1.09	02/28/27
MFS® International Diversification Fund	09/30/04	(N/A)	MDIDX	2.16	29.94	-11.24	25.68	14.97	7.41	-17.30	14.02	6.12	27.54	1.10	1.08	09/30/26
MFS® International Equity Fund <sup>A1</sup>	02/08/23	01/31/96 (R6)	MIEJX	0.05	27.69	-10.89	28.07	10.81	15.16	-14.83	18.67	3.76	22.82	0.99	0.98	10/31/26
MFS® International Growth Fund	10/24/95	(N/A)	MGRAX	2.39	32.17	-9.08	26.82	15.45	9.23	-15.32	14.52	8.84	20.78	1.07	1.06	09/30/26
MFS® International Intrinsic Equity Fund <sup>S2</sup>	10/24/95	(N/A)	MGIAX	3.93	26.83	-9.22	25.56	20.15	10.29	-23.26	17.64	7.15	32.80	1.03	1.02	09/30/26
MFS® International Large Cap Value Fund	06/30/20	(N/A)	MKVBX	—	—	—	—	—	14.44	-9.14	15.93	6.39	39.81	0.99	0.96	09/30/27
MFS® International New Discovery Fund <sup>S3</sup>	10/09/97	(N/A)	MIDAX	0.22	31.75	-10.66	22.52	9.71	4.67	-18.81	12.78	0.65	16.61	1.29	1.28	01/31/27
MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGAX	5.72	18.15	-2.61	20.32	5.11	16.62	-8.41	13.43	12.39	16.21	1.02	0.99	12/31/26
MFS® Research International Fund	01/02/97	(N/A)	MRSAX	-1.10	28.05	-14.21	27.67	12.90	11.60	-17.51	13.10	2.85	22.34	1.00	0.99	12/31/26

<sup>A1</sup> Performance for Class A shares for periods prior to their offering is derived from the performance of the fund's Class R6 shares, adjusted to take into account differences in sales loads and class-specific operating expenses, such as Rule 12b-1 fees and certain shareholder servicing (including sub-accounting) costs, if any. In addition, the performance shown for Class A shares for periods prior to their offering does not reflect any applicable fee reductions and waivers and expense reimbursements that were in effect prior to the offering of Class A shares. Please see the prospectus for additional information about performance and expenses.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

**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.**

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.

As of May 31, 2026



# Class A MFS<sup>®</sup> Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges											Expense Ratios (%) <sup>E1</sup>			
			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Date		
<b>BOND FUNDS</b>																	
MFS <sup>®</sup> Core Bond Fund	06/22/22	(N/A)	MCBEX	—	—	—	—	—	—	—	—	6.07	1.63	6.83	1.51	0.64	08/31/26
MFS <sup>®</sup> Corporate Bond Fund	05/08/74	(N/A)	MFBFX	5.81	6.06	-3.20	14.41	10.99	-1.48	-16.61	8.84	2.77	7.33	0.77	0.76	08/31/26	
MFS <sup>®</sup> Emerging Markets Debt Fund	03/17/98	(N/A)	MEDAX	9.21	9.33	-5.22	13.78	7.73	-2.65	-15.04	10.19	6.79	12.25	1.08	1.07	11/30/26	
MFS <sup>®</sup> Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLAX	9.49	14.44	-6.37	15.76	2.44	-8.30	-8.98	13.22	-4.41	19.16	1.25	1.11	02/28/27	
MFS <sup>®</sup> Global High Yield Fund	07/01/98	(N/A)	MHOAX	12.92	7.10	-3.10	13.99	4.04	2.71	-10.03	12.42	8.31	8.24	1.27	1.02	05/31/27	
MFS <sup>®</sup> Global Opportunistic Bond Fund <sup>4</sup>	06/02/10	(N/A)	MGBAX	2.33	7.58	-2.39	8.13	10.71	-3.21	-11.12	8.35	2.43	5.61	0.95	0.94	03/31/27	
MFS <sup>®</sup> Government Securities Fund	07/25/84	(N/A)	MFGSX	0.52	1.91	0.27	6.19	6.24	-2.18	-12.22	3.83	0.44	6.61	0.78	0.77	06/30/26	
MFS <sup>®</sup> High Income Fund	02/17/78	(N/A)	MHITX	13.38	6.13	-3.30	14.43	4.42	3.20	-10.56	12.18	6.58	8.69	0.86	0.85	05/31/27	
MFS <sup>®</sup> Income Fund <sup>5</sup>	10/29/87	(N/A)	MFIQX	7.84	5.68	-2.39	11.33	9.45	-0.30	-13.57	7.44	2.64	7.35	0.80	0.73	02/28/27	
MFS <sup>®</sup> Inflation-Adjusted Bond Fund	09/30/03	(N/A)	MIAAX	3.98	2.41	-1.97	7.99	10.25	4.50	-11.91	2.14	1.39	6.13	0.83	0.65	02/28/27	
MFS <sup>®</sup> Limited Maturity Fund	02/26/92	(N/A)	MQLFX	1.44	1.29	1.17	4.72	4.14	-0.25	-4.27	5.94	5.15	5.69	0.74	0.58	08/31/26	
MFS <sup>®</sup> Municipal High Income Fund	02/24/84	(N/A)	MMHYX	1.81	7.64	2.08	9.60	3.38	5.30	-13.84	6.14	7.09	3.51	0.73	0.66	05/31/27	
MFS <sup>®</sup> Municipal Income Fund	09/07/93	(N/A)	MFIAX	0.99	5.89	1.00	8.14	4.05	3.00	-11.08	6.72	3.40	3.35	0.77	0.76	07/31/26	
MFS <sup>®</sup> Municipal Intermediate Fund	05/18/21	(N/A)	MIUAX	—	—	—	—	—	—	-7.41	5.85	2.64	5.21	0.84	0.70	07/31/26	
MFS <sup>®</sup> Municipal Limited Maturity Fund	03/17/92	(N/A)	MTLFX	0.05	3.22	1.28	5.31	3.26	0.71	-5.28	4.35	2.89	4.95	0.72	0.59	08/31/26	
MFS <sup>®</sup> Total Return Bond Fund	01/04/99	(N/A)	MRBFX	3.54	4.08	-1.28	9.89	8.68	-1.06	-13.96	7.06	2.30	7.17	0.77	0.60	08/31/26	

<sup>4</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>5</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>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

**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.**

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.

As of May 31, 2026



# Class A MFS<sup>®</sup> Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class A Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data
<b>STATE TAX-ADVANTAGED BOND FUNDS**</b>																
MFS <sup>®</sup> Alabama Municipal Bond Fund	02/01/90	(N/A)	MFALX	0.24	4.47	1.03	7.02	4.04	1.86	-10.77	6.42	1.56	3.40	1.08	0.90	07/31/26
MFS <sup>®</sup> Arkansas Municipal Bond Fund	02/03/92	(N/A)	MFARX	0.00	4.09	1.23	6.19	4.24	2.38	-9.28	5.85	1.75	3.85	0.95	0.70	07/31/26
MFS <sup>®</sup> California Municipal Bond Fund	06/18/85	(N/A)	MCCTX	0.95	6.14	0.94	8.33	4.00	2.93	-11.63	6.97	2.72	2.86	0.84	0.65	07/31/26
MFS <sup>®</sup> Georgia Municipal Bond Fund	06/06/88	(N/A)	MMGAX	0.27	4.32	0.77	6.94	3.49	2.01	-10.25	6.41	1.91	3.43	0.99	0.90	07/31/26
MFS <sup>®</sup> Maryland Municipal Bond Fund	10/31/84	(N/A)	MFSMX	0.63	4.39	1.28	6.40	3.97	2.55	-9.94	6.53	1.94	3.59	1.01	0.85	07/31/26
MFS <sup>®</sup> Massachusetts Municipal Bond Fund	04/09/85	(N/A)	MFSXX	0.38	4.85	0.76	7.31	3.68	2.02	-10.26	6.14	2.20	2.96	0.88	0.82	07/31/26
MFS <sup>®</sup> Mississippi Municipal Bond Fund	08/06/92	(N/A)	MISSX	-0.03	4.06	1.03	6.56	4.23	1.95	-9.82	4.92	1.85	3.80	1.07	0.76	07/31/26
MFS <sup>®</sup> New York Municipal Bond Fund	06/06/88	(N/A)	MSNYX	0.35	5.56	0.58	7.72	3.80	2.96	-12.33	7.33	3.19	2.89	0.96	0.83	07/31/26
MFS <sup>®</sup> North Carolina Municipal Bond Fund	10/31/84	(N/A)	MSNCX	0.21	4.35	0.69	6.84	3.80	2.16	-9.74	5.88	2.28	3.17	0.86	0.84	07/31/26
MFS <sup>®</sup> Pennsylvania Municipal Bond Fund	02/01/93	(N/A)	MFPAX	1.09	5.15	1.43	7.40	4.54	2.64	-10.21	5.49	3.10	3.49	0.95	0.69	07/31/26
MFS <sup>®</sup> South Carolina Municipal Bond Fund	10/31/84	(N/A)	MFSCX	-0.11	4.33	1.02	6.52	4.04	1.77	-10.65	6.14	2.21	3.09	0.91	0.84	07/31/26
MFS <sup>®</sup> Virginia Municipal Bond Fund	10/31/84	(N/A)	MSVAX	0.49	4.01	1.23	6.83	4.39	1.82	-9.88	5.88	1.87	3.20	0.90	0.82	07/31/26
MFS <sup>®</sup> West Virginia Municipal Bond Fund	10/31/84	(N/A)	MFVWX	0.27	3.98	1.01	6.25	4.06	2.04	-9.36	6.01	1.96	3.41	1.02	0.87	07/31/26

\*\* 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.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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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.

As of May 31, 2026



# Class B MFS<sup>®</sup> Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>STOCK FUNDS</b>																	
(a) Massachusetts Investors Growth Stock Fund	09/07/93	(N/A)	MIGBX	4.00	12.82	7.05	12.09	9.14	-0.99	12.82	6.78	11.29	5.35	-4.95	1.46	1.46	—
(a) Massachusetts Investors Trust	09/07/93	(N/A)	MITBX	4.00	12.38	9.37	17.51	20.03	7.53	12.38	9.12	16.79	16.03	3.53	1.44	1.44	—
(a) MFS <sup>®</sup> Blended Research <sup>®</sup> Core Equity Fund	08/11/97	(N/A)	MUSBX	4.00	13.54	13.07	22.26	25.84	9.83	13.54	12.83	21.59	21.84	5.83	1.41	1.40	01/31/27
(a) MFS <sup>®</sup> Blended Research <sup>®</sup> Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWBX	4.00	16.00	13.95	26.07	27.31	8.72	16.00	13.72	25.44	23.31	4.72	1.43	1.39	09/30/26
(a) MFS <sup>®</sup> Blended Research <sup>®</sup> Mid Cap Equity Fund	08/19/16	(N/A)	BMSBX	4.00	10.81	9.32	18.73	19.92	12.05	10.81	9.04	18.01	15.92	8.05	1.67	1.59	09/30/26
(a) MFS <sup>®</sup> Blended Research <sup>®</sup> Small Cap Equity Fund	09/15/15	(N/A)	BRSBX	4.00	8.52	4.30	14.05	31.44	13.62	8.52	3.99	13.27	27.44	9.62	1.88	1.74	09/30/26
(a) MFS <sup>®</sup> Blended Research <sup>®</sup> Value Equity Fund	09/15/15	(N/A)	BRUEX	4.00	10.61	10.36	18.69	25.72	13.47	10.61	10.09	17.97	21.72	9.47	1.44	1.39	09/30/26
(a) MFS <sup>®</sup> Core Equity Fund <sup>F1</sup>	01/02/97	(N/A)	MRGBX	4.00	13.27	9.65	17.71	19.42	7.28	13.27	9.37	16.98	15.42	3.28	1.64	1.63	12/31/26
(q) MFS <sup>®</sup> Equity Income Fund	09/27/12	(N/A)	EQNBX	4.00	11.66	11.08	18.66	27.39	12.89	11.66	10.82	17.95	23.39	8.89	1.68	1.64	11/30/26
(a) MFS <sup>®</sup> Growth Fund	12/29/86	(N/A)	MEGBX	4.00	14.98	9.92	20.72	16.77	5.02	14.98	9.67	20.03	13.09	1.02	1.62	1.61	03/31/27
(q) MFS <sup>®</sup> Low Volatility Equity Fund	12/05/13	(N/A)	MLVBX	4.00	9.68	6.85	11.09	7.49	1.59	9.68	6.58	10.28	3.73	-2.41	1.68	1.64	12/31/26
(a) MFS <sup>®</sup> Mid Cap Growth Fund	12/01/93	(N/A)	OTCBX	4.00	10.52	2.87	11.10	3.81	3.52	10.52	2.58	10.28	0.44	-0.48	1.78	1.77	12/31/26
(a) MFS <sup>®</sup> Mid Cap Value Fund	11/01/01	(N/A)	MCBVX	4.00	9.02	6.75	13.71	16.15	7.58	9.02	6.44	12.93	12.15	3.58	1.73	1.72	01/31/27
(a) MFS <sup>®</sup> New Discovery Fund	11/03/97	(N/A)	MNDBX	4.00	10.53	-0.24	12.90	26.40	10.45	10.53	-0.52	12.11	22.40	6.45	2.03	1.96	12/31/26
(a) MFS <sup>®</sup> New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVBX	4.00	9.28	3.99	11.39	18.00	8.56	9.28	3.70	10.58	14.00	4.56	1.97	1.96	06/30/26
(a) MFS <sup>®</sup> Research Fund	09/07/93	(N/A)	MFRBX	4.00	12.41	9.14	17.07	19.36	6.26	12.41	8.87	16.34	15.36	2.26	1.51	1.50	01/31/27
(a) MFS <sup>®</sup> Technology Fund	04/14/00	(N/A)	MTCBX	4.00	18.96	14.17	30.87	39.95	18.38	18.96	13.97	30.28	35.95	14.38	1.87	1.86	12/31/26
(m) MFS <sup>®</sup> Total Return Fund	08/23/93	(N/A)	MTRBX	4.00	6.50	4.16	9.72	10.59	2.56	6.50	3.86	8.88	6.59	-1.44	1.47	1.47	—
(q) MFS <sup>®</sup> Utilities Fund	09/07/93	(N/A)	MMUBX	4.00	7.99	7.02	10.37	13.81	6.04	7.99	6.71	9.55	9.81	2.04	1.77	1.76	02/28/27
(q) MFS <sup>®</sup> Value Fund	11/04/97	(N/A)	MFEBC	4.00	8.92	6.68	13.01	12.19	4.11	8.92	6.37	12.22	8.19	0.11	1.55	1.54	12/31/26

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

\* Periods less than one year are actual, not annualized.

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

**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.**

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.

Class B shares ("B") results include the applicable contingent deferred sales charge (CDSC), which declines over six years from 4% to 0%. The elimination of the charge begins six years after the end of the month in which shares were initially purchased.

As of May 31, 2026



# Class B MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Data
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>ASSET ALLOCATION STRATEGIES</b>																	
(a) MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MBAGX	4.00	10.02	6.58	14.77	16.79	7.35	10.02	6.26	14.01	12.79	3.35	1.75	1.75	—
(q) MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACBX	4.00	5.10	2.88	8.07	8.75	2.94	5.10	2.54	7.21	4.75	-1.06	1.58	1.58	—
(a) MFS® Global Alternative Strategy Fund <sup>2</sup>	12/20/07	(N/A)	DVRBX	4.00	3.88	4.22	7.81	3.35	0.14	3.88	3.88	6.94	-0.65	-3.86	2.26	2.05	02/28/27
(a) MFS® Growth Allocation Fund	06/28/02	(N/A)	MBGWX	4.00	8.67	5.58	12.94	14.34	5.97	8.67	5.26	12.15	10.34	1.97	1.70	1.69	09/30/26
(a) MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTBX	4.00	6.93	4.00	9.75	10.80	3.98	6.93	3.69	8.92	6.80	-0.02	1.67	1.48	08/31/26
(a) MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFEBX	4.00	8.52	5.67	12.65	14.28	5.74	8.52	5.34	11.86	10.28	1.74	1.73	1.52	08/31/26
(a) MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFBX	4.00	9.51	7.04	15.08	18.07	7.86	9.51	6.73	14.32	14.07	3.86	1.76	1.56	08/31/26
(a) MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMBX	4.00	9.90	7.48	15.89	19.40	8.69	9.90	7.18	15.14	15.40	4.69	1.79	1.56	08/31/26
(a) MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFRX	4.00	10.08	7.82	16.55	20.70	9.49	10.08	7.52	15.81	16.70	5.49	1.80	1.57	08/31/26
(a) MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFIBX	4.00	10.10	7.86	16.60	20.94	9.69	10.10	7.56	15.86	16.94	5.69	1.83	1.57	08/31/26
(a) MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJBX	4.00	10.49	8.12	17.10	21.66	9.84	10.49	7.82	16.37	17.66	5.84	1.91	1.57	08/31/26
(m) MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLBX	4.00	4.23	2.72	7.48	8.70	3.13	4.23	2.40	6.60	4.70	-0.87	1.63	1.44	08/31/26
(a) MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWBX	4.00	2.86	2.92	5.37	3.23	0.95	2.86	2.56	4.46	-0.77	-3.05	2.66	2.14	09/30/26
(q) MFS® Moderate Allocation Fund	06/28/02	(N/A)	MMABX	4.00	6.89	4.16	10.54	11.53	4.38	6.89	3.83	9.71	7.53	0.38	1.64	1.64	—

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

\* Periods less than one year are actual, not annualized.

<sup>2</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

**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.**

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.

Class B shares ("B") results include the applicable contingent deferred sales charge (CDSC), which declines over six years from 4% to 0%. The elimination of the charge begins six years after the end of the month in which shares were initially purchased.

As of May 31, 2026



# Class B MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>GLOBAL/INTERNATIONAL FUNDS</b>																	
(a) MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKBX	4.00	10.65	9.19	26.56	57.38	27.55	10.65	8.90	25.94	53.38	23.55	2.02	1.60	12/31/27
(a) MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXBX	4.00	10.60	11.41	24.39	38.25	15.50	10.60	11.15	23.75	34.25	11.50	1.53	1.52	12/31/26
(a) MFS® Emerging Markets Equity Fund	10/24/95	(N/A)	MEMBX	4.00	8.39	5.58	22.36	43.36	18.22	8.39	5.25	21.69	39.36	14.22	2.10	2.06	09/30/26
(a) MFS® Global Equity Fund	12/29/86	(N/A)	MWEBX	4.00	7.63	2.50	8.56	7.38	0.41	7.63	2.27	7.86	3.93	-3.59	1.97	1.92	02/28/27
(a) MFS® Global Growth Fund	11/18/93	(N/A)	MWOBX	4.00	9.64	3.18	7.99	2.90	-2.71	9.64	2.87	7.13	-0.95	-6.60	2.06	1.97	02/28/27
(a) MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNBX	4.00	7.50	0.78	9.18	8.46	7.29	7.50	0.41	8.34	4.46	3.29	2.51	2.10	12/31/26
(a) MFS® Global Real Estate Fund	12/19/14	(N/A)	MGLDX	4.00	3.73	-1.01	5.43	7.17	6.48	3.73	-1.37	4.52	3.17	2.48	1.94	1.93	12/31/26
(q) MFS® Global Total Return Fund	09/07/93	(N/A)	MFWBX	4.00	5.68	3.99	10.57	13.43	5.12	5.68	3.67	9.75	9.43	1.12	1.95	1.84	02/28/27
(a) MFS® International Diversification Fund	09/30/04	(N/A)	MDIFX	4.00	8.83	5.96	15.94	21.53	9.12	8.83	5.64	15.19	17.53	5.12	1.85	1.83	09/30/26
(a) MFS® International Growth Fund	10/24/95	(N/A)	MGRBX	4.00	8.93	5.24	12.18	10.74	3.46	8.93	4.91	11.38	6.74	-0.54	1.82	1.81	09/30/26
(a) MFS® International Intrinsic Equity Fund <sup>S2</sup>	10/24/95	(N/A)	MGIBX	4.00	9.30	6.90	17.32	20.53	6.50	9.30	6.64	16.59	16.53	2.50	1.78	1.77	09/30/26
(a) MFS® International New Discovery Fund <sup>S3</sup>	10/02/00	(N/A)	MIDBX	4.00	5.73	2.07	10.14	11.48	7.19	5.73	1.74	9.31	7.48	3.19	2.04	2.03	01/31/27
(q) MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGBX	4.00	8.35	7.72	12.73	10.20	3.11	8.35	7.42	11.93	6.20	-0.89	1.77	1.74	12/31/26
(a) MFS® Research International Fund	01/02/98	(N/A)	MRIBX	4.00	7.68	4.61	12.67	16.10	8.30	7.68	4.27	11.87	12.10	4.30	1.75	1.74	12/31/26

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

\* Periods less than one year are actual, not annualized.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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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.

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As of May 31, 2026



# Class B MFS<sup>®</sup> Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Data	
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*				
<b>BOND FUNDS</b>																		
(m) MFS <sup>®</sup> Corporate Bond Fund	09/07/93	(N/A)	MFBBX	4.00	1.92	-0.23	4.64	5.17	0.37	1.92	-0.56	3.72	1.17	-3.58	1.52	1.51	08/31/26	
(m) MFS <sup>®</sup> Emerging Markets Debt Fund	05/31/02	(N/A)	MEDBX	4.00	3.09	1.80	9.25	11.31	1.86	3.09	1.48	8.41	7.31	-2.14	1.83	1.82	11/30/26	
(m) MFS <sup>®</sup> Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLBX	4.00	2.75	1.54	6.70	9.16	0.72	2.75	1.20	5.81	5.16	-3.25	2.00	1.86	02/28/27	
(m) MFS <sup>®</sup> Global High Yield Fund	07/01/98	(N/A)	MHOBX	4.00	4.19	3.28	8.28	6.38	1.27	4.19	2.95	7.42	2.38	-2.71	2.02	1.77	05/31/27	
(m) MFS <sup>®</sup> Global Opportunistic Bond Fund <sup>3</sup>	06/02/10	(N/A)	MGBBX	4.00	1.35	0.18	3.93	3.76	0.34	1.35	-0.17	2.99	-0.24	-3.62	1.70	1.69	03/31/27	
(m) MFS <sup>®</sup> Government Securities Fund	08/30/93	(N/A)	MFG BX	4.00	0.01	-1.26	2.00	3.17	-0.47	0.01	-1.62	1.06	-0.83	-4.41	1.53	1.52	06/30/26	
(m) MFS <sup>®</sup> High Income Fund	09/27/93	(N/A)	MHIBX	4.00	3.93	2.83	7.34	5.89	0.66	3.93	2.51	6.46	1.89	-3.28	1.61	1.60	05/31/27	
(m) MFS <sup>®</sup> Income Fund <sup>4</sup>	09/07/93	(N/A)	MIOBX	4.00	2.08	0.09	4.25	4.69	0.29	2.08	-0.25	3.32	0.69	-3.65	1.55	1.48	02/28/27	
(q) MFS <sup>®</sup> Inflation-Adjusted Bond Fund	09/01/04	(N/A)	MIABX	4.00	1.30	-0.38	2.33	3.21	1.00	1.30	-0.71	1.39	-0.79	-3.00	1.58	1.40	02/28/27	
(m) MFS <sup>®</sup> Limited Maturity Fund	09/07/93	(N/A)	MQLBX	4.00	1.69	1.74	4.42	3.44	0.70	1.69	1.38	3.49	-0.56	-3.27	1.49	1.33	08/31/26	
(m) MFS <sup>®</sup> Municipal High Income Fund	09/07/93	(N/A)	MMHBX	4.00	2.11	0.36	4.90	7.18	2.06	2.11	0.02	3.98	3.18	-1.94	1.73	1.41	05/31/27	
(m) MFS <sup>®</sup> Municipal Income Fund	12/29/86	(N/A)	MMIBX	4.00	1.53	0.06	3.58	6.41	1.37	1.53	-0.30	2.64	2.41	-2.63	1.52	1.51	07/31/26	
(m) MFS <sup>®</sup> Municipal Limited Maturity Fund	09/07/93	(N/A)	MTL BX	4.00	1.21	0.74	3.30	3.91	0.47	1.21	0.37	2.35	-0.09	-3.51	1.47	1.34	08/31/26	
(m) MFS <sup>®</sup> Total Return Bond Fund	12/29/00	(N/A)	MRBBX	4.00	1.35	-0.24	3.89	4.48	0.34	1.35	-0.59	2.96	0.48	-3.62	1.52	1.35	08/31/26	

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

\* Periods less than one year are actual, not annualized.

<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>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of May 31, 2026



# Class B MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>STATE TAX-ADVANTAGED BOND FUNDS**</b>																	
(m) MFS® Alabama Municipal Bond Fund	09/07/93	(N/A)	MBABX	4.00	0.97	-0.32	3.03	6.48	1.35	0.97	-0.68	2.08	2.48	-2.65	1.83	1.65	07/31/26
(m) MFS® Arkansas Municipal Bond Fund	09/07/93	(N/A)	MBARX	4.00	1.09	-0.02	2.83	6.89	1.02	1.09	-0.38	1.88	2.89	-2.98	1.70	1.45	07/31/26
(m) MFS® California Municipal Bond Fund	09/07/93	(N/A)	MBCAX	4.00	1.35	-0.24	3.29	6.93	1.56	1.35	-0.59	2.34	2.93	-2.44	1.59	1.40	07/31/26
(m) MFS® Georgia Municipal Bond Fund	09/07/93	(N/A)	MBGAX	4.00	0.99	-0.16	2.92	6.73	1.43	0.99	-0.53	1.97	2.73	-2.57	1.74	1.65	07/31/26
(m) MFS® Maryland Municipal Bond Fund	09/07/93	(N/A)	MBMDX	4.00	1.18	-0.03	3.13	6.35	1.24	1.18	-0.39	2.18	2.35	-2.76	1.76	1.60	07/31/26
(m) MFS® Massachusetts Municipal Bond Fund	09/07/93	(N/A)	MBMAX	4.00	1.04	-0.22	2.93	6.09	1.35	1.04	-0.59	1.98	2.09	-2.65	1.63	1.57	07/31/26
(m) MFS® Mississippi Municipal Bond Fund	09/07/93	(N/A)	MBMSX	4.00	1.00	-0.16	3.03	6.66	1.37	1.00	-0.52	2.08	2.66	-2.63	1.82	1.41	07/31/26
(m) MFS® New York Municipal Bond Fund	09/07/93	(N/A)	MBNYX	4.00	1.18	-0.23	3.39	6.69	1.48	1.18	-0.59	2.45	2.69	-2.52	1.71	1.58	07/31/26
(m) MFS® North Carolina Municipal Bond Fund	09/07/93	(N/A)	MBNCX	4.00	1.04	-0.10	2.96	6.56	1.44	1.04	-0.46	2.01	2.56	-2.56	1.61	1.59	07/31/26
(m) MFS® Pennsylvania Municipal Bond Fund	09/07/93	(N/A)	MBPAX	4.00	1.42	-0.00	3.29	6.54	1.46	1.42	-0.36	2.35	2.54	-2.54	1.70	1.44	07/31/26
(m) MFS® South Carolina Municipal Bond Fund	09/07/93	(N/A)	MBSCX	4.00	0.90	-0.27	2.94	6.63	1.50	0.90	-0.64	1.99	2.63	-2.50	1.66	1.59	07/31/26
(m) MFS® Virginia Municipal Bond Fund	09/07/93	(N/A)	MBVAX	4.00	1.00	-0.24	2.82	6.49	1.22	1.00	-0.61	1.87	2.49	-2.78	1.65	1.57	07/31/26
(m) MFS® West Virginia Municipal Bond Fund	09/07/93	(N/A)	MBWVX	4.00	1.04	-0.01	2.89	6.58	1.33	1.04	-0.37	1.94	2.58	-2.67	1.77	1.62	07/31/26

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\* Periods less than one year are actual, not annualized.

\*\* 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.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of May 31, 2026



# Class B MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges											Expense Ratios (%) <sup>E1</sup>		
			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>STOCK FUNDS</b>																
Massachusetts Investors Growth Stock Fund	09/07/93	(N/A)	MIGBX	5.37	27.66	0.07	38.81	21.54	25.25	-19.82	23.14	15.47	9.06	1.46	1.46	—
Massachusetts Investors Trust	09/07/93	(N/A)	MITBX	7.95	22.61	-6.06	30.94	13.26	25.88	-16.96	18.27	18.77	12.73	1.44	1.44	—
MFS® Blended Research® Core Equity Fund	08/11/97	(N/A)	MUSBX	7.32	19.43	-8.74	27.49	14.23	28.07	-16.88	27.00	23.99	14.92	1.41	1.40	01/31/27
MFS® Blended Research® Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWBX	5.62	25.68	-5.81	31.07	29.38	27.73	-30.43	39.64	34.29	15.72	1.43	1.39	09/30/26
MFS® Blended Research® Mid Cap Equity Fund	08/19/16	(N/A)	BMSBX	—	17.88	-12.06	28.99	9.34	25.38	-14.53	18.51	18.17	6.95	1.67	1.59	09/30/26
MFS® Blended Research® Small Cap Equity Fund	09/15/15	(N/A)	BRSBX	19.12	12.67	-6.42	25.02	1.07	27.79	-19.24	17.60	3.79	4.70	1.88	1.74	09/30/26
MFS® Blended Research® Value Equity Fund	09/15/15	(N/A)	BRUEX	12.99	15.57	-9.28	22.10	0.59	25.05	-5.11	13.40	11.74	14.22	1.44	1.39	09/30/26
MFS® Core Equity Fund <sup>F1</sup>	01/02/97	(N/A)	MRGBX	10.26	23.56	-4.86	31.80	17.66	24.13	-17.82	21.96	19.18	11.53	1.64	1.63	12/31/26
MFS® Equity Income Fund	09/27/12	(N/A)	EQNBX	9.60	18.71	-8.38	24.55	7.42	25.11	-7.84	15.04	11.78	16.09	1.68	1.64	11/30/26
MFS® Growth Fund	12/29/86	(N/A)	MEGBX	1.44	29.56	1.58	36.32	30.31	22.42	-31.84	34.78	30.36	11.20	1.62	1.61	03/31/27
MFS® Low Volatility Equity Fund	12/05/13	(N/A)	MLVBX	8.97	15.58	-2.16	25.93	10.44	24.22	-11.50	11.28	12.80	9.11	1.68	1.64	12/31/26
MFS® Mid Cap Growth Fund	12/01/93	(N/A)	OTCBX	3.58	25.01	0.04	36.51	34.31	12.90	-29.08	20.13	13.55	2.61	1.78	1.77	12/31/26
MFS® Mid Cap Value Fund	11/01/01	(N/A)	MCBVX	14.55	12.55	-12.34	29.59	3.22	29.53	-9.66	11.68	12.82	5.33	1.73	1.72	01/31/27
MFS® New Discovery Fund	11/03/97	(N/A)	MNDBX	7.80	25.06	-2.37	39.76	43.57	0.48	-30.38	13.16	5.32	11.52	2.03	1.96	12/31/26
MFS® New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVBX	25.19	13.81	-12.01	32.28	2.60	32.49	-11.74	10.12	8.28	1.41	1.97	1.96	06/30/26
MFS® Research Fund	09/07/93	(N/A)	MFRBX	7.93	22.38	-5.17	32.10	15.75	23.78	-17.89	21.56	17.90	11.98	1.51	1.50	01/31/27
MFS® Technology Fund	04/14/00	(N/A)	MTCBX	7.39	37.38	0.86	34.70	44.96	12.52	-36.69	52.78	35.44	15.20	1.87	1.86	12/31/26
MFS® Total Return Fund	08/23/93	(N/A)	MTRBX	8.04	11.30	-6.47	19.31	8.89	13.11	-10.34	9.47	6.80	10.16	1.47	1.47	—
MFS® Utilities Fund	09/07/93	(N/A)	MMUBX	10.55	13.89	0.03	23.97	5.21	13.02	-0.30	-2.96	10.54	13.97	1.77	1.76	02/28/27
MFS® Value Fund	11/04/97	(N/A)	MFE BX	13.00	16.58	-10.74	28.75	2.88	24.17	-6.84	7.10	10.79	12.02	1.55	1.54	12/31/26

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

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of May 31, 2026



## Class B MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data
<b>ASSET ALLOCATION STRATEGIES</b>																
MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MBAGX	6.42	21.96	-7.65	28.66	14.68	17.97	-17.72	15.12	10.98	14.01	1.75	1.75	—
MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACBX	4.58	10.00	-3.81	16.19	10.77	7.00	-14.08	9.57	5.79	8.75	1.58	1.58	—
MFS® Global Alternative Strategy Fund <sup>2</sup>	12/20/07	(N/A)	DVRBX	-4.45	5.41	-1.43	11.93	3.52	2.68	-6.10	8.16	8.66	9.72	2.26	2.05	02/28/27
MFS® Growth Allocation Fund	06/28/02	(N/A)	MBGWX	6.70	18.02	-6.53	25.24	13.60	14.85	-16.68	13.70	9.62	12.46	1.70	1.69	09/30/26
MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTBX	7.79	16.02	-6.60	20.75	10.72	11.69	-14.63	11.29	7.27	9.71	1.67	1.48	08/31/26
MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFEBX	8.10	18.19	-7.96	23.87	11.79	15.98	-15.65	13.70	9.49	12.04	1.73	1.52	08/31/26
MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFBX	7.97	19.57	-8.51	24.95	12.00	17.74	-16.13	15.14	11.25	13.88	1.76	1.56	08/31/26
MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMBX	8.00	20.08	-8.88	25.51	12.18	19.04	-16.36	15.47	11.77	14.54	1.79	1.56	08/31/26
MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFRX	8.01	20.03	-8.86	25.54	12.15	19.24	-16.49	15.64	12.08	15.13	1.80	1.57	08/31/26
MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFIBX	7.89	20.03	-8.87	25.56	12.15	19.19	-16.44	15.69	12.05	15.09	1.83	1.57	08/31/26
MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJBX	—	20.03	-8.82	25.71	12.28	19.24	-16.58	15.69	12.61	15.89	1.91	1.57	08/31/26
MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLBX	4.25	7.15	-3.37	12.68	9.06	5.50	-12.43	8.53	5.18	8.13	1.63	1.44	08/31/26
MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWBX	-1.97	5.69	1.00	7.70	2.02	0.36	-3.13	4.34	5.39	6.64	2.66	2.14	09/30/26
MFS® Moderate Allocation Fund	06/28/02	(N/A)	MMABX	5.71	13.94	-5.19	20.92	12.68	10.92	-15.85	11.66	7.60	10.88	1.64	1.64	—

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

<sup>2</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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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.

As of May 31, 2026



## Class B MFS® Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges											Expense Ratios (%) <sup>E1</sup>		
			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>GLOBAL/INTERNATIONAL FUNDS</b>																
MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKBX	13.59	37.71	-17.25	17.86	8.85	2.67	-19.85	8.72	13.01	32.40	2.02	1.60	12/31/27
MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXBX	0.61	25.89	-16.39	20.85	7.97	12.28	-14.22	13.21	10.66	38.57	1.53	1.52	12/31/26
MFS® Emerging Markets Equity Fund	10/24/95	(N/A)	MEMBX	7.76	36.36	-14.69	18.91	9.34	-7.69	-20.71	10.05	10.16	32.50	2.10	2.06	09/30/26
MFS® Global Equity Fund	12/29/86	(N/A)	MWEBX	6.29	22.68	-10.50	29.22	13.03	16.19	-18.57	13.36	4.69	12.56	1.97	1.92	02/28/27
MFS® Global Growth Fund	11/18/93	(N/A)	MWOBX	4.28	30.39	-5.67	34.36	19.33	17.46	-19.91	19.69	9.86	6.33	2.06	1.97	02/28/27
MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNBX	5.80	28.45	-9.23	29.22	22.65	11.07	-27.63	17.29	1.54	7.31	2.51	2.10	12/31/26
MFS® Global Real Estate Fund	12/19/14	(N/A)	MGLDX	6.44	11.74	-4.65	25.10	1.15	28.50	-27.76	10.15	-3.83	2.56	1.94	1.93	12/31/26
MFS® Global Total Return Fund	09/07/93	(N/A)	MFWBX	4.54	14.26	-7.84	17.32	8.48	7.48	-11.49	9.41	3.21	14.79	1.95	1.84	02/28/27
MFS® International Diversification Fund	09/30/04	(N/A)	MDIFX	1.43	28.91	-11.91	24.74	14.14	6.62	-17.90	13.12	5.37	26.55	1.85	1.83	09/30/26
MFS® International Growth Fund	10/24/95	(N/A)	MGRBX	1.61	31.13	-9.76	25.92	14.57	8.42	-15.97	13.68	8.04	19.87	1.82	1.81	09/30/26
MFS® International Intrinsic Equity Fund <sup>S2</sup>	10/24/95	(N/A)	MGIBX	3.17	25.86	-9.90	24.62	19.25	9.49	-23.84	16.75	6.35	31.79	1.78	1.77	09/30/26
MFS® International New Discovery Fund <sup>S3</sup>	10/02/00	(N/A)	MIDBX	-0.47	30.72	-11.31	21.59	8.89	3.90	-19.41	11.87	-0.10	15.77	2.04	2.03	01/31/27
MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGBX	4.87	17.26	-3.38	19.37	4.37	15.74	-9.06	12.58	11.51	15.36	1.77	1.74	12/31/26
MFS® Research International Fund	01/02/98	(N/A)	MRIBX	-1.86	27.08	-14.85	26.74	12.02	10.78	-18.12	12.27	2.03	21.49	1.75	1.74	12/31/26

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<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of May 31, 2026



## Class B MFS<sup>®</sup> Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data
<b>BOND FUNDS</b>																
MFS <sup>®</sup> Corporate Bond Fund	09/07/93	(N/A)	MFBBX	5.03	5.28	-3.94	13.60	10.19	-2.29	-17.23	8.13	1.92	6.63	1.52	1.51	08/31/26
MFS <sup>®</sup> Emerging Markets Debt Fund	05/31/02	(N/A)	MEDBX	8.46	8.50	-5.96	12.99	6.97	-3.42	-15.67	9.35	6.09	11.39	1.83	1.82	11/30/26
MFS <sup>®</sup> Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLBX	8.81	13.58	-7.06	14.89	1.67	-8.98	-9.81	12.57	-5.12	18.25	2.00	1.86	02/28/27
MFS <sup>®</sup> Global High Yield Fund	07/01/98	(N/A)	MHOBX	12.07	6.30	-3.81	13.13	3.26	1.95	-10.68	11.58	7.50	7.43	2.02	1.77	05/31/27
MFS <sup>®</sup> Global Opportunistic Bond Fund <sup>3</sup>	06/02/10	(N/A)	MGBBX	1.69	6.70	-3.15	7.49	9.82	-3.86	-11.85	7.57	1.67	4.83	1.70	1.69	03/31/27
MFS <sup>®</sup> Government Securities Fund	08/30/93	(N/A)	MFGBX	-0.13	1.15	-0.48	5.30	5.56	-2.92	-13.00	3.17	-0.31	5.82	1.53	1.52	06/30/26
MFS <sup>®</sup> High Income Fund	09/27/93	(N/A)	MHIBX	12.54	5.34	-3.73	13.55	3.64	2.43	-11.19	11.33	5.79	7.53	1.61	1.60	05/31/27
MFS <sup>®</sup> Income Fund <sup>4</sup>	09/07/93	(N/A)	MIOBX	7.07	4.92	-3.09	10.40	8.69	-1.06	-14.19	6.66	1.86	6.57	1.55	1.48	02/28/27
MFS <sup>®</sup> Inflation-Adjusted Bond Fund	09/01/04	(N/A)	MIABX	3.12	1.75	-2.73	7.11	9.59	3.72	-12.63	1.37	0.65	5.33	1.58	1.40	02/28/27
MFS <sup>®</sup> Limited Maturity Fund	09/07/93	(N/A)	MQLBX	0.67	0.70	0.24	4.12	3.37	-1.00	-5.00	5.15	4.37	4.91	1.49	1.33	08/31/26
MFS <sup>®</sup> Municipal High Income Fund	09/07/93	(N/A)	MMHBX	0.89	6.96	1.32	8.65	2.74	4.52	-14.47	5.35	6.30	2.75	1.73	1.41	05/31/27
MFS <sup>®</sup> Municipal Income Fund	12/29/86	(N/A)	MMIBX	0.25	4.97	0.37	7.21	3.28	2.35	-11.82	5.93	2.64	2.59	1.52	1.51	07/31/26
MFS <sup>®</sup> Municipal Limited Maturity Fund	09/07/93	(N/A)	MTL BX	-0.70	2.46	0.53	4.66	2.38	-0.03	-6.00	3.59	2.14	4.17	1.47	1.34	08/31/26
MFS <sup>®</sup> Total Return Bond Fund	12/29/00	(N/A)	MRBBX	2.77	3.20	-1.92	9.07	7.86	-1.80	-14.58	6.26	1.54	6.26	1.52	1.35	08/31/26

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<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.

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As of May 31, 2026



## Class B MFS<sup>®</sup> Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

	Class B Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges										Expense Ratios (%) <sup>E1</sup>		
				2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data
<b>STATE TAX-ADVANTAGED BOND FUNDS**</b>																
MFS <sup>®</sup> Alabama Municipal Bond Fund	09/07/93	(N/A)	MBABX	-0.50	3.70	0.28	6.23	3.27	1.10	-11.44	5.63	0.91	2.63	1.83	1.65	07/31/26
MFS <sup>®</sup> Arkansas Municipal Bond Fund	09/07/93	(N/A)	MBARX	-0.75	3.31	0.38	5.50	3.47	1.62	-9.95	5.07	0.99	3.08	1.70	1.45	07/31/26
MFS <sup>®</sup> California Municipal Bond Fund	09/07/93	(N/A)	MBCAX	0.18	5.34	0.19	7.53	3.23	2.17	-12.29	6.18	1.96	2.10	1.59	1.40	07/31/26
MFS <sup>®</sup> Georgia Municipal Bond Fund	09/07/93	(N/A)	MBGAX	-0.47	3.54	0.03	6.15	2.75	1.25	-10.88	5.61	1.15	2.56	1.74	1.65	07/31/26
MFS <sup>®</sup> Maryland Municipal Bond Fund	09/07/93	(N/A)	MBMDX	-0.03	3.60	0.52	5.61	3.20	1.70	-10.62	5.74	1.18	2.83	1.76	1.60	07/31/26
MFS <sup>®</sup> Massachusetts Municipal Bond Fund	09/07/93	(N/A)	MBMAX	-0.39	4.05	-0.00	6.49	2.82	1.25	-10.91	5.35	1.54	2.21	1.63	1.57	07/31/26
MFS <sup>®</sup> Mississippi Municipal Bond Fund	09/07/93	(N/A)	MBMSX	-0.70	3.47	0.38	5.76	3.67	1.29	-10.59	4.36	1.19	3.13	1.82	1.41	07/31/26
MFS <sup>®</sup> New York Municipal Bond Fund	09/07/93	(N/A)	MBNYX	-0.41	4.78	-0.09	6.83	3.03	2.19	-12.93	6.44	2.42	2.23	1.71	1.58	07/31/26
MFS <sup>®</sup> North Carolina Municipal Bond Fund	09/07/93	(N/A)	MBNCX	-0.46	3.57	-0.15	6.14	2.96	1.48	-10.42	5.00	1.52	2.50	1.61	1.59	07/31/26
MFS <sup>®</sup> Pennsylvania Municipal Bond Fund	09/07/93	(N/A)	MBPAX	0.32	4.26	0.68	6.70	3.76	1.88	-10.84	4.70	2.23	2.72	1.70	1.44	07/31/26
MFS <sup>®</sup> South Carolina Municipal Bond Fund	09/07/93	(N/A)	MBSCX	-0.77	3.46	0.27	5.73	3.28	1.02	-11.33	5.35	1.46	2.33	1.66	1.59	07/31/26
MFS <sup>®</sup> Virginia Municipal Bond Fund	09/07/93	(N/A)	MBVAX	-0.27	3.32	0.39	6.04	3.62	1.06	-10.46	5.00	1.11	2.43	1.65	1.57	07/31/26
MFS <sup>®</sup> West Virginia Municipal Bond Fund	09/07/93	(N/A)	MBWVX	-0.39	3.10	0.34	5.46	3.28	1.29	-10.04	5.22	1.20	2.54	1.77	1.62	07/31/26

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\*\* 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.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of May 31, 2026



# Class C MFS<sup>®</sup> Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Data	
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*				
<b>STOCK FUNDS</b>																		
(a)	Massachusetts Investors Growth Stock Fund	11/03/97	(N/A)	MIGDX	1.00	12.82	7.05	12.10	9.15	-0.97	12.82	7.05	12.10	8.21	-1.96	1.46	1.46	—
(a)	Massachusetts Investors Trust	07/01/96	(N/A)	MITCX	1.00	12.38	9.36	17.50	20.03	7.52	12.38	9.36	17.50	19.03	6.52	1.44	1.44	—
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Core Equity Fund	08/11/97	(N/A)	MUECX	1.00	13.53	13.07	22.25	25.84	9.82	13.53	13.07	22.25	24.84	8.82	1.41	1.40	01/31/27
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWCX	1.00	15.99	13.95	26.07	27.32	8.70	15.99	13.95	26.07	26.32	7.70	1.43	1.39	09/30/26
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Mid Cap Equity Fund	08/19/16	(N/A)	BMSDX	1.00	10.80	9.33	18.71	19.92	12.02	10.80	9.33	18.71	18.92	11.02	1.67	1.59	09/30/26
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Small Cap Equity Fund	09/15/15	(N/A)	BRSXH	1.00	8.52	4.30	14.07	31.49	13.59	8.52	4.30	14.07	30.49	12.59	1.88	1.74	09/30/26
(a)	MFS <sup>®</sup> Blended Research <sup>®</sup> Value Equity Fund	09/15/15	(N/A)	BRUGX	1.00	10.61	10.36	18.66	25.70	13.45	10.61	10.36	18.66	24.70	12.45	1.44	1.39	09/30/26
(a)	MFS <sup>®</sup> Core Equity Fund <sup>E1</sup>	01/02/97	(N/A)	MRGCX	1.00	13.27	9.65	17.71	19.43	7.26	13.27	9.65	17.71	18.43	6.26	1.64	1.63	12/31/26
(q)	MFS <sup>®</sup> Equity Income Fund	09/27/12	(N/A)	EQNCX	1.00	11.66	11.10	18.67	27.44	12.92	11.66	11.10	18.67	26.44	11.92	1.68	1.64	11/30/26
(a)	MFS <sup>®</sup> Growth Fund	04/01/96	(N/A)	MFEEX	1.00	14.98	9.92	20.72	16.76	5.01	14.98	9.92	20.72	15.84	4.01	1.62	1.61	03/31/27
(a)	MFS <sup>®</sup> Intrinsic Equity Fund	02/08/22	(N/A)	UIVCX	1.00	6.93	—	12.05	9.07	0.00	6.93	—	12.05	8.07	-1.00	6.71	1.69	11/30/26
(q)	MFS <sup>®</sup> Low Volatility Equity Fund	12/05/13	(N/A)	MLVGX	1.00	9.67	6.84	11.08	7.42	1.54	9.67	6.84	11.08	6.48	0.54	1.68	1.64	12/31/26
(a)	MFS <sup>®</sup> Mid Cap Growth Fund	08/01/94	(N/A)	OTCCX	1.00	10.51	2.86	11.10	3.76	3.45	10.51	2.86	11.10	2.93	2.45	1.78	1.77	12/31/26
(a)	MFS <sup>®</sup> Mid Cap Value Fund	11/01/01	(N/A)	MVCCX	1.00	9.02	6.74	13.70	16.11	7.58	9.02	6.74	13.70	15.11	6.58	1.73	1.72	01/31/27
(a)	MFS <sup>®</sup> New Discovery Fund	11/03/97	(N/A)	MNDCX	1.00	10.53	-0.24	12.91	26.41	10.46	10.53	-0.24	12.91	25.41	9.46	2.03	1.96	12/31/26
(a)	MFS <sup>®</sup> New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVCX	1.00	9.28	3.99	11.40	18.00	8.59	9.28	3.99	11.40	17.00	7.59	1.97	1.96	06/30/26
(a)	MFS <sup>®</sup> Research Fund	01/03/94	(N/A)	MFCRX	1.00	12.41	9.14	17.07	19.35	6.27	12.41	9.14	17.07	18.35	5.27	1.51	1.50	01/31/27
(a)	MFS <sup>®</sup> Technology Fund	04/14/00	(N/A)	MTCCX	1.00	18.96	14.17	30.88	39.93	18.38	18.96	14.17	30.88	38.93	17.38	1.87	1.86	12/31/26
(m)	MFS <sup>®</sup> Total Return Fund	08/01/94	(N/A)	MTRCX	1.00	6.49	4.16	9.71	10.60	2.51	6.49	4.16	9.71	9.60	1.51	1.47	1.47	—
(q)	MFS <sup>®</sup> Utilities Fund	01/03/94	(N/A)	MMUCX	1.00	7.99	7.02	10.36	13.80	6.01	7.99	7.02	10.36	12.80	5.01	1.77	1.76	02/28/27
(q)	MFS <sup>®</sup> Value Fund	11/05/97	(N/A)	MEICX	1.00	8.92	6.68	13.01	12.19	4.11	8.92	6.68	13.01	11.19	3.11	1.55	1.54	12/31/26

\* Periods less than one year are actual, not annualized.

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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Class C shares have no initial sales charge but if they are redeemed within 1 year from the end of the prior month of purchase, they may be subject to a 1% contingent deferred sales charge (CDSC).

As of May 31, 2026



# Class C MFS<sup>®</sup> Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>ASSET ALLOCATION STRATEGIES</b>																	
(a) MFS <sup>®</sup> Aggressive Growth Allocation Fund	06/28/02	(N/A)	MCAGX	1.00	10.01	6.57	14.78	16.78	7.33	10.01	6.57	14.78	15.78	6.33	1.75	1.75	—
(q) MFS <sup>®</sup> Conservative Allocation Fund	06/28/02	(N/A)	MACVX	1.00	5.10	2.88	8.08	8.78	2.93	5.10	2.88	8.08	7.78	1.93	1.58	1.58	—
(m) MFS <sup>®</sup> Diversified Income Fund <sup>2</sup>	05/26/06	(N/A)	DIFCX	1.00	4.19	2.88	8.32	10.66	4.57	4.19	2.88	8.32	9.66	3.57	1.71	1.64	06/30/26
(a) MFS <sup>®</sup> Global Alternative Strategy Fund <sup>3</sup>	12/20/07	(N/A)	DVRCX	1.00	3.88	4.21	7.81	3.39	0.22	3.88	4.21	7.81	2.39	-0.78	2.26	2.05	02/28/27
(a) MFS <sup>®</sup> Growth Allocation Fund	06/28/02	(N/A)	MCGWX	1.00	8.67	5.58	12.93	14.36	5.95	8.67	5.58	12.93	13.36	4.95	1.70	1.69	09/30/26
(a) MFS <sup>®</sup> Lifetime <sup>®</sup> 2030 Fund	09/29/05	(N/A)	MLTCX	1.00	6.93	4.00	9.75	10.75	3.94	6.93	4.00	9.75	9.75	2.94	1.67	1.48	08/31/26
(a) MFS <sup>®</sup> Lifetime <sup>®</sup> 2035 Fund	11/02/12	(N/A)	LFECX	1.00	8.53	5.66	12.65	14.32	5.74	8.53	5.66	12.65	13.32	4.74	1.73	1.52	08/31/26
(a) MFS <sup>®</sup> Lifetime <sup>®</sup> 2040 Fund	09/29/05	(N/A)	MLFCX	1.00	9.52	7.03	15.07	18.03	7.81	9.52	7.03	15.07	17.03	6.81	1.76	1.56	08/31/26
(a) MFS <sup>®</sup> Lifetime <sup>®</sup> 2045 Fund	11/02/12	(N/A)	LTMDX	1.00	9.91	7.48	15.88	19.45	8.71	9.91	7.48	15.88	18.45	7.71	1.79	1.56	08/31/26
(a) MFS <sup>®</sup> Lifetime <sup>®</sup> 2050 Fund	09/15/10	(N/A)	MFFDX	1.00	10.09	7.83	16.54	20.67	9.46	10.09	7.83	16.54	19.67	8.46	1.80	1.57	08/31/26
(a) MFS <sup>®</sup> Lifetime <sup>®</sup> 2055 Fund	11/02/12	(N/A)	LFICX	1.00	10.09	7.83	16.56	20.79	9.56	10.09	7.83	16.56	19.79	8.56	1.83	1.57	08/31/26
(a) MFS <sup>®</sup> Lifetime <sup>®</sup> 2060 Fund	12/06/16	(N/A)	MFJCX	1.00	10.32	7.78	16.52	20.75	9.53	10.32	7.78	16.52	19.75	8.53	1.91	1.57	08/31/26
(a) MFS <sup>®</sup> Lifetime <sup>®</sup> 2065 Fund	09/01/21	(N/A)	LFTGX	1.00	7.16	—	16.58	20.85	9.56	7.16	—	16.58	19.85	8.56	2.78	1.57	08/31/26
(m) MFS <sup>®</sup> Lifetime <sup>®</sup> Income Fund	09/29/05	(N/A)	MLLCX	1.00	4.23	2.72	7.48	8.70	3.13	4.23	2.72	7.48	7.70	2.13	1.63	1.44	08/31/26
(a) MFS <sup>®</sup> Managed Wealth Fund	06/27/14	(N/A)	MNWCX	1.00	2.86	2.91	5.37	3.16	0.95	2.86	2.91	5.37	2.16	-0.05	2.66	2.14	09/30/26
(q) MFS <sup>®</sup> Moderate Allocation Fund	06/28/02	(N/A)	MMACX	1.00	6.89	4.17	10.54	11.58	4.39	6.89	4.17	10.54	10.58	3.39	1.64	1.64	—

\* Periods less than one year are actual, not annualized.

<sup>2</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>3</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

<sup>E1</sup> **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 contractual reductions will continue until last date noted under the "Waiver End Date" column.

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As of May 31, 2026



# Class C MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>		
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*			
<b>GLOBAL/INTERNATIONAL FUNDS</b>																	
(a) MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKCX	1.00	10.66	9.18	26.57	57.30	27.55	10.66	9.18	26.57	56.30	26.55	2.02	1.60	12/31/27
(a) MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXCX	1.00	10.60	11.41	24.39	38.18	15.43	10.60	11.41	24.39	37.18	14.43	1.53	1.52	12/31/26
(a) MFS® Emerging Markets Equity Fund	06/27/96	(N/A)	MEMCX	1.00	8.39	5.57	22.35	43.32	18.20	8.39	5.57	22.35	42.32	17.20	2.10	2.06	09/30/26
(a) MFS® Emerging Markets Equity Research Fund	02/23/21	(N/A)	EEMRX	1.00	5.14	5.91	21.44	48.75	23.71	5.14	5.91	21.44	47.75	22.71	10.84	2.06	11/30/26
(a) MFS® Global Equity Fund	01/03/94	(N/A)	MWECX	1.00	7.63	2.50	8.55	7.37	0.39	7.63	2.50	8.55	6.53	-0.61	1.97	1.92	02/28/27
(a) MFS® Global Growth Fund	01/03/94	(N/A)	MWOCX	1.00	9.64	3.18	7.99	2.89	-2.72	9.64	3.18	7.99	1.93	-3.69	2.06	1.97	02/28/27
(a) MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNCX	1.00	7.50	0.78	9.18	8.46	7.29	7.50	0.78	9.18	7.46	6.29	2.51	2.10	12/31/26
(a) MFS® Global Real Estate Fund <sup>D1</sup>	12/19/14	(N/A)	MGLCX	1.00	3.73	-1.01	5.43	7.16	6.49	3.73	-1.01	5.43	6.16	5.49	1.94	1.93	12/31/26
(q) MFS® Global Total Return Fund	01/03/94	(N/A)	MFWCX	1.00	5.68	3.98	10.58	13.44	5.08	5.68	3.98	10.58	12.44	4.08	1.95	1.84	02/28/27
(a) MFS® International Diversification Fund	09/30/04	(N/A)	MDIGX	1.00	8.83	5.97	15.92	21.54	9.09	8.83	5.97	15.92	20.54	8.09	1.85	1.83	09/30/26
(a) MFS® International Growth Fund	07/01/96	(N/A)	MGRCX	1.00	8.94	5.23	12.18	10.73	3.46	8.94	5.23	12.18	9.73	2.46	1.82	1.81	09/30/26
(a) MFS® International Intrinsic Equity Fund <sup>S2</sup>	07/01/96	(N/A)	MGICX	1.00	9.30	6.90	17.32	20.54	6.47	9.30	6.90	17.32	19.54	5.47	1.78	1.77	09/30/26
(a) MFS® International Large Cap Value Fund	06/30/20	(N/A)	MKVCX	1.00	14.93	10.76	20.73	27.22	9.75	14.93	10.76	20.73	26.22	8.75	1.74	1.71	09/30/27
(a) MFS® International New Discovery Fund <sup>S3</sup>	10/02/00	(N/A)	MIDCX	1.00	5.73	2.07	10.14	11.47	7.18	5.73	2.07	10.14	10.47	6.18	2.04	2.03	01/31/27
(q) MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGCX	1.00	8.36	7.71	12.71	10.22	3.12	8.36	7.71	12.71	9.22	2.12	1.77	1.74	12/31/26
(a) MFS® Research International Fund	01/02/98	(N/A)	MRICX	1.00	7.68	4.60	12.66	16.05	8.33	7.68	4.60	12.66	15.05	7.33	1.75	1.74	12/31/26

\* Periods less than one year are actual, not annualized.

<sup>D1</sup> Performance for Class C 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.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of May 31, 2026



# Class C MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date	
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*				
<b>BOND FUNDS</b>																		
(m) MFS® Core Bond Fund	06/22/22	(N/A)	MCBCX	1.00	2.45	—	3.27	4.26	0.13	2.45	—	3.27	3.26	-0.85	2.26	1.39	08/31/26	
(m) MFS® Corporate Bond Fund	01/03/94	(N/A)	MFBCX	1.00	1.92	-0.25	4.64	5.08	0.37	1.92	-0.25	4.64	4.08	-0.62	1.52	1.51	08/31/26	
(m) MFS® Emerging Markets Debt Fund	05/31/02	(N/A)	MEDCX	1.00	3.08	1.80	9.23	11.32	1.86	3.08	1.80	9.23	10.32	0.86	1.83	1.82	11/30/26	
(m) MFS® Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLCX	1.00	2.75	1.57	6.70	9.16	0.89	2.75	1.57	6.70	8.16	-0.11	2.00	1.86	02/28/27	
(m) MFS® Global High Yield Fund	07/01/98	(N/A)	MHOCX	1.00	4.17	3.27	8.29	6.39	1.27	4.17	3.27	8.29	5.39	0.28	2.02	1.77	05/31/27	
(m) MFS® Global Opportunistic Bond Fund <sup>4</sup>	06/02/10	(N/A)	MGBDX	1.00	1.35	0.18	3.88	3.88	0.34	1.35	0.18	3.88	2.88	-0.65	1.70	1.69	03/31/27	
(m) MFS® Government Securities Fund	04/01/96	(N/A)	MFGDX	1.00	0.01	-1.25	2.04	3.29	-0.47	0.01	-1.25	2.04	2.29	-1.45	1.53	1.52	06/30/26	
(m) MFS® High Income Fund	01/03/94	(N/A)	MHICX	1.00	3.96	2.90	7.33	5.89	0.66	3.96	2.90	7.33	4.89	-0.32	1.61	1.60	05/31/27	
(m) MFS® Income Fund <sup>5</sup>	09/01/94	(N/A)	MIOCX	1.00	2.09	0.11	4.25	4.87	0.46	2.09	0.11	4.25	3.87	-0.53	1.55	1.48	02/28/27	
(q) MFS® Inflation-Adjusted Bond Fund	09/01/04	(N/A)	MIACX	1.00	1.20	-0.47	2.27	3.21	1.01	1.20	-0.47	2.27	2.21	0.01	1.58	1.50	02/28/27	
(m) MFS® Limited Maturity Fund	07/01/94	(N/A)	MQLCX	1.00	1.57	1.61	4.25	3.16	0.49	1.57	1.61	4.25	2.16	-0.50	1.49	1.43	08/31/26	
(m) MFS® Municipal High Income Fund	09/25/98	(N/A)	MMHCX	1.00	1.86	0.08	4.63	6.91	1.96	1.86	0.08	4.63	5.91	0.96	1.73	1.66	05/31/27	
(m) MFS® Municipal Income Fund	01/03/94	(N/A)	MMICX	1.00	1.53	0.06	3.57	6.39	1.37	1.53	0.06	3.57	5.39	0.37	1.52	1.51	07/31/26	
(m) MFS® Municipal Intermediate Fund	05/18/21	(N/A)	MIUCX	1.00	0.72	0.69	3.72	5.82	1.02	0.72	0.69	3.72	4.82	0.02	1.59	1.45	07/31/26	
(m) MFS® Municipal Limited Maturity Fund	07/01/94	(N/A)	MTLCX	1.00	1.12	0.66	3.23	3.94	0.55	1.12	0.66	3.23	2.94	-0.45	1.47	1.44	08/31/26	
(m) MFS® Total Return Bond Fund	12/29/00	(N/A)	MRBCX	1.00	1.24	-0.35	3.75	4.27	0.20	1.24	-0.35	3.75	3.27	-0.79	1.52	1.45	08/31/26	

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<sup>4</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>5</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>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of May 31, 2026



# Class C MFS® Fund Performance Results

Average annual total returns with capital gain distributions and income dividends reinvested.

Distribution Frequency, if applicable (a) Annually (s) Semiannually (q) Quarterly (m) Monthly	Class C Inception Date	Comparable Share Class Inception Date	Symbol	Max Sales Charge (%)	Average Annual Total Returns (%)										Expense Ratios (%) <sup>E1</sup>			
					Not Including Sales Charges					Including Sales Charges					Gross	Net	Waiver End Date	
					10 yr/ Life	5 yr	3 yr	1 yr	YTD*	10 yr/ Life	5 yr	3 yr	1 yr	YTD*				
<b>STATE TAX-ADVANTAGED BOND FUNDS**</b>																		
(m) MFS® California Municipal Bond Fund	01/03/94	(N/A)	MCCAX	1.00	1.20	-0.38	3.13	6.76	1.49	1.20	-0.38	3.13	5.76	0.49	1.59	1.55	07/31/26	
(m) MFS® New York Municipal Bond Fund	12/11/00	(N/A)	MCNYX	1.00	1.19	-0.23	3.42	6.79	1.58	1.19	-0.23	3.42	5.79	0.58	1.71	1.58	07/31/26	
(m) MFS® North Carolina Municipal Bond Fund	01/03/94	(N/A)	MCNCX	1.00	1.04	-0.08	2.99	6.56	1.43	1.04	-0.08	2.99	5.56	0.43	1.61	1.59	07/31/26	
(m) MFS® Virginia Municipal Bond Fund	01/03/94	(N/A)	MVACX	1.00	1.01	-0.22	2.82	6.49	1.22	1.01	-0.22	2.82	5.49	0.22	1.65	1.57	07/31/26	

\* Periods less than one year are actual, not annualized.

\*\* 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.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

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As of May 31, 2026



# Class C MFS<sup>®</sup> Fund Performance Results

Calendar year total returns with capital gain distributions and income dividends reinvested.

Class C Inception Date	Comparable Share Class Inception Date	Symbol	Past Years' Annual Rates of Return (%), Not Including Sales Charges											Expense Ratios (%) <sup>E1</sup>		
			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>STOCK FUNDS</b>																
Massachusetts Investors Growth Stock Fund	11/03/97	(N/A)	MIGDX	5.34	27.67	0.06	38.80	21.52	25.27	-19.83	23.14	15.47	9.04	1.46	1.46	—
Massachusetts Investors Trust	07/01/96	(N/A)	MITCX	7.97	22.62	-6.04	30.88	13.28	25.89	-16.97	18.26	18.75	12.74	1.44	1.44	—
MFS <sup>®</sup> Blended Research <sup>®</sup> Core Equity Fund	08/11/97	(N/A)	MUECX	7.33	19.40	-8.74	27.52	14.24	28.07	-16.89	27.02	23.96	14.94	1.41	1.40	01/31/27
MFS <sup>®</sup> Blended Research <sup>®</sup> Growth Equity Fund <sup>1</sup>	09/15/15	(N/A)	BRWCX	5.62	25.68	-5.86	31.09	29.40	27.74	-30.45	39.65	34.29	15.75	1.43	1.39	09/30/26
MFS <sup>®</sup> Blended Research <sup>®</sup> Mid Cap Equity Fund	08/19/16	(N/A)	BMSDX	—	17.83	-11.97	28.90	9.35	25.46	-14.58	18.48	18.14	6.98	1.67	1.59	09/30/26
MFS <sup>®</sup> Blended Research <sup>®</sup> Small Cap Equity Fund	09/15/15	(N/A)	BRSXH	19.02	12.68	-6.30	24.95	1.00	27.83	-19.21	17.62	3.76	4.71	1.88	1.74	09/30/26
MFS <sup>®</sup> Blended Research <sup>®</sup> Value Equity Fund	09/15/15	(N/A)	BRUGX	12.88	15.56	-9.27	22.08	0.64	25.02	-5.10	13.39	11.80	14.18	1.44	1.39	09/30/26
MFS <sup>®</sup> Core Equity Fund <sup>F1</sup>	01/02/97	(N/A)	MRGCX	10.28	23.51	-4.84	31.75	17.63	24.14	-17.80	21.94	19.20	11.54	1.64	1.63	12/31/26
MFS <sup>®</sup> Equity Income Fund	09/27/12	(N/A)	EQNCX	9.56	18.71	-8.40	24.54	7.45	25.06	-7.80	14.99	11.84	16.06	1.68	1.64	11/30/26
MFS <sup>®</sup> Growth Fund	04/01/96	(N/A)	MFECX	1.44	29.56	1.58	36.32	30.30	22.42	-31.84	34.77	30.37	11.20	1.62	1.61	03/31/27
MFS <sup>®</sup> Intrinsic Equity Fund	02/08/22	(N/A)	UIVCX	—	—	—	—	—	—	—	23.62	9.55	11.39	6.71	1.69	11/30/26
MFS <sup>®</sup> Low Volatility Equity Fund	12/05/13	(N/A)	MLVGX	8.87	15.66	-2.16	25.87	10.51	24.20	-11.54	11.29	12.85	9.07	1.68	1.64	12/31/26
MFS <sup>®</sup> Mid Cap Growth Fund	08/01/94	(N/A)	OTCCX	3.59	25.01	0.12	36.45	34.28	12.91	-29.07	20.11	13.57	2.62	1.78	1.77	12/31/26
MFS <sup>®</sup> Mid Cap Value Fund	11/01/01	(N/A)	MVCCX	14.57	12.55	-12.35	29.57	3.24	29.54	-9.66	11.69	12.84	5.30	1.73	1.72	01/31/27
MFS <sup>®</sup> New Discovery Fund	11/03/97	(N/A)	MNDCX	7.79	25.12	-2.36	39.70	43.53	0.53	-30.34	13.09	5.29	11.53	2.03	1.96	12/31/26
MFS <sup>®</sup> New Discovery Value Fund <sup>S1</sup>	05/26/11	(N/A)	NDVCX	25.14	13.80	-11.99	32.28	2.61	32.47	-11.72	10.08	8.30	1.38	1.97	1.96	06/30/26
MFS <sup>®</sup> Research Fund	01/03/94	(N/A)	MFRCX	7.90	22.44	-5.20	32.11	15.71	23.80	-17.89	21.57	17.93	11.97	1.51	1.50	01/31/27
MFS <sup>®</sup> Technology Fund	04/14/00	(N/A)	MTCCX	7.36	37.42	0.83	34.72	44.96	12.51	-36.68	52.76	35.44	15.20	1.87	1.86	12/31/26
MFS <sup>®</sup> Total Return Fund	08/01/94	(N/A)	MTRCX	8.06	11.24	-6.45	19.33	8.83	13.14	-10.32	9.47	6.76	10.22	1.47	1.47	—
MFS <sup>®</sup> Utilities Fund	01/03/94	(N/A)	MMUCX	10.56	13.84	0.07	23.97	5.18	13.02	-0.29	-3.00	10.60	13.98	1.77	1.76	02/28/27
MFS <sup>®</sup> Value Fund	11/05/97	(N/A)	MEICX	13.02	16.55	-10.76	28.76	2.90	24.16	-6.84	7.11	10.80	12.01	1.55	1.54	12/31/26

<sup>1</sup> Performance information prior to March 7, 2022, reflects time periods when the fund was classified as a diversified fund. The fund was reclassified from diversified to non-diversified effective March 7, 2022.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

<sup>F1</sup> Included in all fund classes' total returns for the year ended December 31, 2017, are proceeds received from a non-recurring litigation settlement against Household International Inc. Had these proceeds not been included, all total returns within calendar year 2017 would have been lower by 0.89%.

<sup>S1</sup> On August 14, 2019, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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As of May 31, 2026



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			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>ASSET ALLOCATION STRATEGIES</b>																
MFS® Aggressive Growth Allocation Fund	06/28/02	(N/A)	MCAGX	6.43	21.94	-7.65	28.68	14.65	17.99	-17.73	15.15	10.98	13.99	1.75	1.75	—
MFS® Conservative Allocation Fund	06/28/02	(N/A)	MACVX	4.64	10.04	-3.83	16.20	10.75	7.04	-14.11	9.55	5.85	8.73	1.58	1.58	—
MFS® Diversified Income Fund <sup>2</sup>	05/26/06	(N/A)	DIFCX	7.78	7.75	-4.34	16.43	1.38	8.49	-13.68	8.51	4.27	8.62	1.71	1.64	06/30/26
MFS® Global Alternative Strategy Fund <sup>3</sup>	12/20/07	(N/A)	DVRCX	-4.47	5.40	-1.43	11.90	3.60	2.67	-6.08	8.13	8.63	9.70	2.26	2.05	02/28/27
MFS® Growth Allocation Fund	06/28/02	(N/A)	MCGWX	6.70	18.06	-6.54	25.25	13.62	14.85	-16.70	13.71	9.63	12.47	1.70	1.69	09/30/26
MFS® Lifetime® 2030 Fund	09/29/05	(N/A)	MLTCX	7.78	16.07	-6.66	20.78	10.75	11.70	-14.64	11.34	7.23	9.70	1.67	1.48	08/31/26
MFS® Lifetime® 2035 Fund	11/02/12	(N/A)	LFECX	8.03	18.25	-7.96	23.86	11.75	16.05	-15.72	13.76	9.41	12.09	1.73	1.52	08/31/26
MFS® Lifetime® 2040 Fund	09/29/05	(N/A)	MLFCX	8.00	19.56	-8.50	24.94	12.01	17.71	-16.10	15.13	11.20	13.96	1.76	1.56	08/31/26
MFS® Lifetime® 2045 Fund	11/02/12	(N/A)	LTMDX	7.93	20.06	-8.90	25.58	12.14	19.06	-16.33	15.48	11.77	14.52	1.79	1.56	08/31/26
MFS® Lifetime® 2050 Fund	09/15/10	(N/A)	MFFDX	7.96	20.02	-8.88	25.55	12.17	19.23	-16.47	15.65	12.09	15.17	1.80	1.57	08/31/26
MFS® Lifetime® 2055 Fund	11/02/12	(N/A)	LFICX	7.89	20.01	-8.86	25.54	12.14	19.25	-16.46	15.66	12.06	15.11	1.83	1.57	08/31/26
MFS® Lifetime® 2060 Fund	12/06/16	(N/A)	MFJCX	—	20.03	-8.81	25.66	12.39	19.19	-16.58	15.64	12.09	15.00	1.91	1.57	08/31/26
MFS® Lifetime® 2065 Fund	09/01/21	(N/A)	LFTGX	—	—	—	—	—	—	-16.81	15.82	12.15	15.01	2.78	1.57	08/31/26
MFS® Lifetime® Income Fund	09/29/05	(N/A)	MLLCX	4.26	7.16	-3.29	12.68	8.98	5.50	-12.37	8.53	5.10	8.13	1.63	1.44	08/31/26
MFS® Managed Wealth Fund	06/27/14	(N/A)	MNWCX	-1.98	5.72	1.00	7.74	2.02	0.36	-3.15	4.46	5.25	6.68	2.66	2.14	09/30/26
MFS® Moderate Allocation Fund	06/28/02	(N/A)	MMACX	5.68	13.91	-5.16	20.86	12.69	10.94	-15.82	11.61	7.61	10.89	1.64	1.64	—

<sup>2</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>3</sup> Performance information for periods prior to July 13, 2018 reflects periods when a subadvisor was responsible for managing the fund's tactical asset allocation overlay under a different investment process.

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			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>GLOBAL/INTERNATIONAL FUNDS</b>																
MFS® Blended Research® Emerging Markets Equity Fund	09/15/15	(N/A)	BRKCX	13.47	37.84	-17.27	17.87	8.83	2.65	-19.85	8.74	13.03	32.39	2.02	1.60	12/31/27
MFS® Blended Research® International Equity Fund	09/15/15	(N/A)	BRXCX	0.61	25.82	-16.36	20.81	7.99	12.33	-14.26	13.19	10.74	38.61	1.53	1.52	12/31/26
MFS® Emerging Markets Equity Fund	06/27/96	(N/A)	MEMCX	7.76	36.38	-14.66	18.87	9.36	-7.67	-20.73	10.05	10.15	32.52	2.10	2.06	09/30/26
MFS® Emerging Markets Equity Research Fund	02/23/21	(N/A)	EEMRX	—	—	—	—	—	—	-23.05	8.18	6.21	29.60	10.84	2.06	11/30/26
MFS® Global Equity Fund	01/03/94	(N/A)	MWECX	6.27	22.68	-10.50	29.24	13.03	16.16	-18.57	13.35	4.69	12.57	1.97	1.92	02/28/27
MFS® Global Growth Fund	01/03/94	(N/A)	MWOXC	4.29	30.39	-5.65	34.32	19.33	17.49	-19.91	19.69	9.86	6.34	2.06	1.97	02/28/27
MFS® Global New Discovery Fund	12/16/11	(N/A)	GLNCX	5.80	28.45	-9.29	29.31	22.65	11.07	-27.63	17.29	1.54	7.31	2.51	2.10	12/31/26
MFS® Global Real Estate Fund <sup>P1</sup>	12/19/14	(N/A)	MGLCX	6.40	11.79	-4.67	25.11	1.16	28.49	-27.74	10.11	-3.80	2.57	1.94	1.93	12/31/26
MFS® Global Total Return Fund	01/03/94	(N/A)	MFWCX	4.50	14.31	-7.88	17.35	8.47	7.51	-11.54	9.45	3.21	14.82	1.95	1.84	02/28/27
MFS® International Diversification Fund	09/30/04	(N/A)	MDIGX	1.40	29.00	-11.91	24.73	14.13	6.62	-17.93	13.13	5.39	26.55	1.85	1.83	09/30/26
MFS® International Growth Fund	07/01/96	(N/A)	MGRCX	1.64	31.13	-9.75	25.89	14.59	8.41	-15.96	13.68	8.02	19.89	1.82	1.81	09/30/26
MFS® International Intrinsic Equity Fund <sup>S2</sup>	07/01/96	(N/A)	MGICX	3.16	25.86	-9.92	24.64	19.25	9.48	-23.84	16.72	6.37	31.82	1.78	1.77	09/30/26
MFS® International Large Cap Value Fund	06/30/20	(N/A)	MKVXC	—	—	—	—	—	13.64	-9.84	15.08	5.53	38.80	1.74	1.71	09/30/27
MFS® International New Discovery Fund <sup>S3</sup>	10/02/00	(N/A)	MIDCX	-0.49	30.75	-11.31	21.58	8.89	3.88	-19.40	11.89	-0.10	15.77	2.04	2.03	01/31/27
MFS® Low Volatility Global Equity Fund	12/05/13	(N/A)	MVGCX	4.80	17.27	-3.30	19.34	4.39	15.75	-9.06	12.52	11.55	15.34	1.77	1.74	12/31/26
MFS® Research International Fund	01/02/98	(N/A)	MRICX	-1.88	27.07	-14.82	26.69	12.08	10.76	-18.15	12.27	2.05	21.44	1.75	1.74	12/31/26

<sup>P1</sup> Performance for Class C 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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<sup>S2</sup> Effective May 29, 2015, the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

<sup>S3</sup> Effective November 29, 2019 the fund closed to new investors subject to certain exceptions. Please see the prospectus for additional information.

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			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Date	
<b>BOND FUNDS</b>																
MFS® Core Bond Fund	06/22/22	(N/A)	MCBCX	—	—	—	—	—	—	—	5.39	0.77	6.04	2.26	1.39	08/31/26
MFS® Corporate Bond Fund	01/03/94	(N/A)	MFBCX	5.03	5.28	-3.94	13.53	10.20	-2.23	-17.24	8.05	2.00	6.54	1.52	1.51	08/31/26
MFS® Emerging Markets Debt Fund	05/31/02	(N/A)	MEDCX	8.46	8.50	-5.97	12.92	6.98	-3.36	-15.69	9.27	6.09	11.40	1.83	1.82	11/30/26
MFS® Emerging Markets Debt Local Currency Fund	09/15/11	(N/A)	EMLCX	8.68	13.60	-7.07	14.91	1.81	-8.98	-9.81	12.38	-4.95	18.06	2.00	1.86	02/28/27
MFS® Global High Yield Fund	07/01/98	(N/A)	MHOCX	12.09	6.47	-3.99	13.34	3.09	1.94	-10.74	11.61	7.51	7.44	2.02	1.77	05/31/27
MFS® Global Opportunistic Bond Fund <sup>4</sup>	06/02/10	(N/A)	MGBDX	1.69	6.70	-3.15	7.49	9.82	-3.97	-11.75	7.57	1.54	4.96	1.70	1.69	03/31/27
MFS® Government Securities Fund	04/01/96	(N/A)	MFGDX	-0.13	1.15	-0.48	5.29	5.54	-2.91	-12.96	3.17	-0.41	5.93	1.53	1.52	06/30/26
MFS® High Income Fund	01/03/94	(N/A)	MHICX	12.51	5.34	-4.00	13.56	3.64	2.43	-11.19	11.33	5.79	7.88	1.61	1.60	05/31/27
MFS® Income Fund <sup>5</sup>	09/01/94	(N/A)	MIOCX	7.08	4.92	-3.01	10.25	8.71	-1.07	-14.09	6.66	1.86	6.40	1.55	1.48	02/28/27
MFS® Inflation-Adjusted Bond Fund	09/01/04	(N/A)	MIACX	3.12	1.65	-2.92	7.10	9.42	3.61	-12.80	1.41	0.52	5.27	1.58	1.50	02/28/27
MFS® Limited Maturity Fund	07/01/94	(N/A)	MQLCX	0.58	0.60	0.14	4.01	3.27	-1.09	-5.08	5.05	4.26	4.80	1.49	1.43	08/31/26
MFS® Municipal High Income Fund	09/25/98	(N/A)	MMHCX	0.67	6.70	1.07	8.38	2.48	4.26	-14.68	5.09	6.03	2.49	1.73	1.66	05/31/27
MFS® Municipal Income Fund	01/03/94	(N/A)	MMICX	0.24	5.08	0.26	7.32	3.27	2.23	-11.70	5.92	2.64	2.59	1.52	1.51	07/31/26
MFS® Municipal Intermediate Fund	05/18/21	(N/A)	MIUCX	—	—	—	—	—	—	-8.13	5.07	1.99	4.32	1.59	1.45	07/31/26
MFS® Municipal Limited Maturity Fund	07/01/94	(N/A)	MTLCX	-0.79	2.35	0.55	4.42	2.39	-0.25	-6.08	3.60	2.03	3.94	1.47	1.44	08/31/26
MFS® Total Return Bond Fund	12/29/00	(N/A)	MRBCX	2.67	3.10	-2.02	8.86	7.85	-1.89	-14.76	6.27	1.44	6.16	1.52	1.45	08/31/26

<sup>4</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>5</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.

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			2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Gross	Net	Waiver End Data	
<b>STATE TAX-ADVANTAGED BOND FUNDS**</b>																
MFS® California Municipal Bond Fund	01/03/94	(N/A)	MCCAX	0.05	5.18	0.05	7.35	3.07	2.01	-12.37	6.00	1.63	2.13	1.59	1.55	07/31/26
MFS® New York Municipal Bond Fund	12/11/00	(N/A)	MCNYX	-0.32	4.77	-0.18	6.92	2.93	2.28	-12.99	6.44	2.52	2.13	1.71	1.58	07/31/26
MFS® North Carolina Municipal Bond Fund	01/03/94	(N/A)	MCNCX	-0.47	3.48	-0.07	6.04	3.03	1.40	-10.42	5.10	1.52	2.51	1.61	1.59	07/31/26
MFS® Virginia Municipal Bond Fund	01/03/94	(N/A)	MVACX	-0.36	3.32	0.48	6.03	3.62	1.06	-10.54	5.00	1.21	2.44	1.65	1.57	07/31/26

\*\* 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.

<sup>E1</sup> **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 contractual reductions will continue until at least date noted under the "Waiver End Date" column.

**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.**

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.

**Keep in mind that all investments, including mutual funds, carry a certain amount of risk including the possible loss of the principal amount invested.**

**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.**