



# MFS® Flexible Pricing Options

Please note that Letter of Intent/Right of Accumulation (LOI/ROA) linking must meet certain eligibility criteria. Please see the prospectus for more information on these and other pricing policies.

## Class A Shares (All information as of 2/23/26)

### US Equity, Global/International Equity, Target Date/Multi-Asset and Specialty/Alternative

Massachusetts Investors Trust  
 Massachusetts Investors Growth Stock Fund  
 MFS® Blended Research® Core Equity Fund  
 MFS® Blended Research® Emerging Markets Equity Fund  
 MFS® Blended Research® Growth Equity Fund  
 MFS® Blended Research® International Equity Fund  
 MFS® Blended Research® Mid Cap Equity Fund  
 MFS® Blended Research® Small Cap Equity Fund  
 MFS® Blended Research® Value Equity Fund  
 MFS® Commodity Strategy Fund  
 MFS® Core Equity Fund  
 MFS® Emerging Markets Equity Fund  
 MFS® Emerging Markets Equity Research Fund  
 MFS® Equity Income Fund  
 MFS® Global Alternative Strategy Fund  
 MFS® Global Equity Fund  
 MFS® Global Growth Fund  
 MFS® Global New Discovery Fund  
 MFS® Global Real Estate Fund  
 MFS® Growth Fund  
 MFS® International Diversification Fund  
 MFS® International Equity Fund  
 MFS® International Growth Fund  
 MFS® International Intrinsic Value Fund<sup>b</sup>  
 MFS® International Large Cap Value Fund  
 MFS® International New Discovery Fund<sup>b</sup>  
 MFS® Intrinsic Value Fund  
 MFS® Lifetime® Funds:  
 2025 Fund, 2030 Fund, 2035 Fund,  
 2040 Fund, 2045 Fund, 2050 Fund,  
 2055 Fund, 2060 Fund, 2065 Fund  
 MFS® Low Volatility Equity Fund  
 MFS® Low Volatility Global Equity Fund  
 MFS® Managed Wealth Fund  
 MFS® Mid Cap Growth Fund  
 MFS® Mid Cap Value Fund  
 MFS® New Discovery Fund  
 MFS® New Discovery Value Fund<sup>b</sup>  
 MFS® Research Fund  
 MFS® Research International Fund  
 MFS® Technology Fund  
 MFS® Utilities Fund  
 MFS® Value Fund

Purchase amount	Sales charge <sup>1</sup> (% of offering price)
Less than \$50,000	5.75%
\$50,000 to < \$100,000	4.75%
\$100,000 to < \$250,000	3.75%
\$250,000 to < \$500,000	2.75%
\$500,000 to < \$1M	2.00%
Greater than \$1M <sup>2</sup>	None

### Fixed Income and MFS® Lifetime Income (excluding Limited Maturity)

MFS® Core Bond Fund  
 MFS® Corporate Bond Fund  
 MFS® Diversified Income Fund<sup>3</sup>  
 MFS® Emerging Markets Debt Fund  
 MFS® Emerging Markets Debt Local Currency Fund  
 MFS® Global High Yield Fund  
 MFS® Global Opportunistic Bond Fund<sup>d</sup>  
 MFS® Government Securities Fund  
 MFS® High Income Fund  
 MFS® Income Fund  
 MFS® Inflation-Adjusted Bond Fund  
 MFS® Lifetime® Income Fund<sup>3</sup>  
 MFS® Total Return Bond Fund

Purchase amount	Sales charge <sup>1</sup> (% of offering price)
Less than \$100,000	4.25%
\$100,000 to < \$250,000	3.25%
\$250,000 to < \$500,000	2.25%
Greater than \$500,000 <sup>2</sup>	None

### Tax-Advantaged Fixed Income (excluding Limited Maturity)

MFS® Municipal High Income Fund  
 MFS® Municipal Income Fund  
 MFS® Municipal Intermediate Fund  
 MFS® State Municipal Bond Funds

Purchase amount	Sales charge <sup>1</sup> (% of offering price)
Less than \$100,000	4.25%
\$100,000 to < \$250,000	3.25%
Greater than \$250,000 <sup>2</sup>	None

### Limited Maturity

MFS® Limited Maturity Fund  
 MFS® Municipal Limited Maturity Fund

Purchase amount	Sales charge <sup>1</sup> (% of offering price)
Less than \$50,000	2.50%
\$50,000 to < \$100,000	2.25%
\$100,000 to < \$250,000	2.00%
Greater than \$250,000 <sup>2</sup>	None

### Target Risk and Total Return

MFS® Aggressive Growth Allocation Fund  
 MFS® Conservative Allocation Fund  
 MFS® Global Total Return Fund  
 MFS® Growth Allocation Fund  
 MFS® Moderate Allocation Fund  
 MFS® Total Return Fund

Purchase amount	Sales charge <sup>1</sup> (% of offering price)
Less than \$50,000	5.75%
\$50,000 to < \$100,000	4.75%
\$100,000 to < \$250,000	3.75%
Greater than \$250,000 <sup>2</sup>	None

For investment commitments within a 13-month period, **Letters of Intent** may be used to qualify for reduced sales charges

A number of funds are subject to a variety of fee waivers and/or expense reductions.

Please check the fund's current prospectus for full details.

<sup>1</sup> Due to rounding in the calculation of offering price, actual sales charges paid may be more or less than those calculated using these percentages.

<sup>2</sup> For Class A share net asset value (NAV) purchases: Shares redeemed within 18 months may be subject to a 1% contingent deferred sales charge (CDSC). For MFS® Limited Maturity and MFS® Municipal Limited Maturity Funds, class A NAV purchases that are redeemed within 18 months of purchase will be subject to a 0.75% CDSC charge.

<sup>3</sup> This fund has fixed income pricing but is categorized as Multi-Asset.

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

For pricing information about our Class R (available only to certain retirement plans and asset-based fee programs) and Class I (available through various wrap platforms) share structures, please visit the products and performance page at [mfs.com](http://mfs.com) or any applicable prospectus.



## Class C Shares

Purchases and maximum account value up to \$249,999 for Target Risk, Tax-Advantaged Fixed Income, Limited Maturity, MFS® Global Total Return and MFS® Total Return Funds; \$499,999 for Fixed Income and MFS® Lifetime Income; and \$999,999 for Equity, Target Date and Multi-Asset Funds.†

### Contingent deferred sales charge

- 1% on redemptions within 12 months

Convert to Class A shares, which have lower expenses, after 8 years

### Withdrawals free of sales charge

- shares acquired by reinvestment of dividends and capital gains
- principal appreciation
- Systematic Withdrawal Plan of up to 10% of fund/account value annually
- principal amounts invested more than one year

**NOTE:** Class C shares are not available on all funds. Please see the appropriate fund prospectus for availability of Class C shares.

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

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

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

<sup>d</sup> Effective April 30, 2021, changes were made to the fund's strategy, benchmark, and portfolio management. The fund's new strategy has increased flexibility to invest in below investment grade securities. Please see the fund's prospectus for more information.

<sup>†</sup> Purchases of additional shares will not be allowed if the value of all accounts (determined using MFS' new LOI/ROA policy) is above the amounts noted for particular fund categories. The maximum account value includes all assets in Classes A and C shares.

NOTE: Systematic withdrawal plans of up to 10% of fund/account value annually from Class A share net asset value (NAV) purchases also qualify for withdrawals free of sales charge.

You should consider your financial needs, goals, and risk tolerance before making any investment decisions. For further details, please refer to [mfs.com](https://www.mfs.com) and the appropriate fund's prospectus.

Certain types of group retirement plans sponsored or serviced by MFS or an affiliate may be exempt from these maximums.

**Note: The funds and other information in this piece are subject to change.**

**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](https://www.mfs.com). Please read it carefully.**