



## SERVICE MATTERS

### IMPORTANT NOTIFICATION: Share class name change for MFS® R5 Shares

Effective August 26, 2016, the name of Class R5 shares for the MFS Funds will be changed to Class R6 shares. All other class attributes (including fee structure, eligibility requirements, and conversion privileges) will remain the same.

The share class name change will take effect automatically on August 26, 2016, in MFS' systems. No shareholder action is required.

The following is a list of affected funds:

FUND	CUSIP	CLASS	TICKER SYMBOL
MASSACHUSETTS INVESTORS TRUST	575736814	R5	MITJX
MASSACHUSETTS INVESTORS GROWTH STOCK FUND	575719828	R5	MIGNX
MFS® ABSOLUTE RETURN FUND	552743809	R5	MRNVX
MFS® BLENDED RESEARCH® CORE EQUITY FUND	55273W483	R5	MUEVX
MFS® BLENDED RESEARCH® EMERGING MARKETS EQUITY FUND	552987240	R5	BRKVX
MFS® BLENDED RESEARCH® INTERNATIONAL EQUITY FUND	552987448	R5	BRXVX
MFS® BLENDED RESEARCH® GLOBAL EQUITY FUND	552987349	R5	BRLYX
MFS® BLENDED RESEARCH® GROWTH EQUITY FUND	552743783	R5	BRWVX
MFS® BLENDED RESEARCH® SMALL CAP EQUITY FUND	552743684	R5	BRSYX
MFS® BLENDED RESEARCH® VALUE EQUITY FUND	552746133	R5	BRUNX
MFS® COMMODITY STRATEGY FUND*	55276T826	R5	MCSRX
MFS® CORE EQUITY FUND	55273H320	R5	MRGKX
MFS® CORPORATE BOND FUND	55274K702	R5	MFBKX
MFS® DIVERSIFIED INCOME FUND	552982738	R5	DIFHX

MFS® EMERGING MARKETS DEBT FUND	552746364	R5	MEDHX
MFS® EMERGING MARKETS DEBT LOCAL CURRENCY FUND	552746323	R5	EMLNX
MFS® EMERGING MARKETS EQUITY FUND	552746331	R5	MEMJX
MFS® EQUITY INCOME FUND	552988545	R5	EQNVX
MFS® EQUITY OPPORTUNITIES FUND	55275E283	R5	SRFHX
MFS® GLOBAL ALTERNATIVE STRATEGY FUND	55276T834	R5	DVRLX
MFS® GLOBAL BOND FUND	552743882	R5	MGBOX
MFS® GLOBAL EQUITY FUND	552986622	R5	MWEMX
MFS® GLOBAL GROWTH FUND	552989782	R5	MWOKX
MFS® GLOBAL HIGH YIELD FUND	552984676	R5	MHOVX
MFS® GLOBAL MULTI-ASSET FUND	55278K880	R5	GLMVX
MFS® GLOBAL NEW DISCOVERY FUND	552987547	R5	GLNNX
MFS® GLOBAL REAL ESTATE FUND	552982720	R5	MGLRX
MFS® GLOBAL TOTAL RETURN FUND	552986614	R5	MFWLX
MFS® GOVERNMENT SECURITIES FUND	552982712	R5	MFGKX
MFS® GROWTH FUND	552985673	R5	MFEKX
MFS® HIGH INCOME FUND	552984684	R5	MHIKX
MFS® INFLATION-ADJUSTED BOND FUND	55274K884	R5	MIAKX
MFS® INTERNATIONAL GROWTH FUND	552746356	R5	MGRDX
MFS® INTERNATIONAL NEW DISCOVERY FUND	552981383	R5	MIDLX
MFS® INTERNATIONAL VALUE FUND	552746349	R5	MINJX
MFS® LIMITED MATURITY FUND	55274K801	R5	MQLKX
MFS® LOW VOLATILITY EQUITY FUND	55273H221	R5	MLVTX
MFS® LOW VOLATILITY GLOBAL EQUITY FUND	55273H122	R5	MVGNX
MFS® MID CAP GROWTH FUND	552987554	R5	OTCKX
MFS® MID CAP VALUE FUND	55273W475	R5	MVCKX
MFS® NEW DISCOVERY FUND	55273H346	R5	MNDKX
MFS® NEW DISCOVERY VALUE FUND	552982696	R5	NDVVX
MFS® RESEARCH FUND	552981391	R5	MFRKX
MFS® RESEARCH INTERNATIONAL FUND	55273H361	R5	MRSKX
MFS® TECHNOLOGY FUND	55273H338	R5	MTCLX
MFS® TOTAL RETURN BOND FUND	55274K603	R5	MRBKX
MFS® TOTAL RETURN FUND	552981375	R5	MSFKX
MFS® UTILITIES FUND	552986598	R5	MMUKX

*\* Not available for direct purchase.*

## IMPORTANT REMINDER ABOUT THE MFS® 529 SAVINGS PLAN

MFS® has notified all clients invested in the MFS 529 Savings Plan of important upcoming changes to the Plan including investment option changes effective on or about July 14, 2016. The changes will impact **Account Owners invested in the MFS® International Diversification™ Fund Investment Option and the Age-Based Investment Option**. The changes are briefly described below.

### Closure of MFS International Diversification Fund Investment Option

On or about July 14, 2016, the MFS® International Diversification Fund will no longer be part of the MFS® 529 Savings Plan. Shares of the Fund will be automatically transferred and invested in the MFS® Research International Fund. Account owners are not required to take any action with respect to this change.

## FUND

				TICKER
FUND CLOSING	CUSIP	CLASS		SYMBOL
MFS INTERNATIONAL DIVERSIFICATION FUND	55273G264	529-A		MDIEX
MFS INTERNATIONAL DIVERSIFICATION FUND	55273G256	529-B		MDIMX
MFS INTERNATIONAL DIVERSIFICATION FUND	55273G249	529-C		MDINX
ASSETS TRANSITION TO	CUSIP	CLASS		TICKER
				SYMBOL
MFS RESEARCH INTERNATIONAL FUND	55273H106	529-A		EARSX
MFS RESEARCH INTERNATIONAL FUND	55273H205	529-B		EBRIX
MFS RESEARCH INTERNATIONAL FUND	55273H304	529-C		ECRIX

### Age-Based Investment Option:

When selecting the age-based investment approach, clients' assets are automatically transferred to a more conservative asset allocation fund as the beneficiary approaches college age. Effective July 2016, the glide path will be adjusted by one year, completing at the MFS® Limited Maturity Fund at age 18. Beginning in July 2016, automatic exchanges take place on the quarterly exchange date on or following the beneficiary's **fifth, tenth, fourteenth, sixteenth and eighteenth birthdays**. The next exchange date will occur on July 14, 2016. The account owner may opt out of the age-based investment

option at any time, subject to the twice-per-calendar-year limitation on investment strategy changes.

AGE OF DESIGNATED BENEFICIARY	INVESTMENT FUNDS
AGE 0–4	MFS® AGGRESSIVE GROWTH ALLOCATION FUND
AGE 5–9	MFS® GROWTH ALLOCATION FUND
AGE 10–13	MFS® MODERATE ALLOCATION FUND
AGE 14–15	MFS® CONSERVATIVE ALLOCATION FUND
AGE 16–17	MFS® LIFETIME INCOME FUND
AGE 18+	MFS® LIMITED MATURITY FUND

#### Addition of investment fund

The MFS® Blended Research® Small Cap Equity Fund will be added as an investment option for those using the Individual Investment Fund approach.

FUND	CUSIP	TICKER CLASS SYMBOL
MFS BLENDED RESEARCH SMALL CAP EQUITY FUND	552743676	529-A BRSNX
MFS BLENDED RESEARCH SMALL CAP EQUITY FUND	552743668	529-B BRSQX
MFS BLENDED RESEARCH SMALL CAP EQUITY FUND	552743650	529-C BRSWX

#### IMPORTANT NOTIFICATION: MFS® LIFETIME® FUNDS

MFS® currently offers a suite of target date funds-of-funds that include the MFS® Lifetime® Income Fund, the MFS® Lifetime® 2020 Fund, the MFS® Lifetime® 2025 Fund, the MFS® Lifetime® 2030 Fund, the MFS® Lifetime® 2035 Fund, the MFS® Lifetime® 2040 Fund, the MFS® Lifetime® 2045 Fund, the MFS® Lifetime® 2050 Fund, and the MFS® Lifetime® 2055 Fund (the "MFS Lifetime Funds"). Effective August 26, 2016, the MFS Lifetime Funds will incorporate seven additional underlying funds into their asset allocation mix, which will provide further equity diversification. These additional underlying equity funds, which are sourced from MFS' Blended Research® product line, combine MFS' fundamental and quantitative research capabilities. The seven additional funds are:

- MFS® Blended Research® Core Equity Fund
- MFS® Blended Research® Growth Equity Fund

- MFS® Blended Research® Value Equity Fund
- MFS® Blended Research® Mid Cap Equity Fund
- MFS® Blended Research® Small Cap Equity Fund
- MFS® Blended Research® International Equity Fund
- MFS® Blended Research® Emerging Markets Equity Fund

A portion of each MFS Lifetime Fund's existing underlying equity fund allocations will be reallocated to some or all of these additional funds. None of the current underlying funds in the MFS Lifetime Funds will be removed.

As a fund-of-funds, each Lifetime Fund indirectly incurs a portion of the operating expenses of the underlying funds in which the Lifetime Fund invests (the "Underlying Fund Fees and Expenses"). It is expected that the Underlying Fund Fees and Expenses incurred by the MFS Lifetime Funds will be reduced as a result of the reallocations.

Please note that each MFS Lifetime Fund's investment objective, approach and portfolio management team will remain unchanged.

The changes to the investment allocations of the MFS Lifetime Funds will occur automatically, and there is no action required for investors as a result of these changes.

The MFS Blended Research Mid Cap Equity Fund is currently in registration with the Securities and Exchange Commission and will not be available for investment until August 2016.

- **Please note that an email was sent to advisors to inform them of the changes and a letter will be mailed to affected shareholders to inform them of the changes.**
- **Please contact a Dealer Services representative at 1-800-367-0075 if you have any questions.**

### MFS back office contact information

Team	Contact information
<p><b>Dealer Services</b> This group works closely with the National Securities Clearing Corporation and our system provider to ensure that our interface is working properly on a daily basis and there are no issues with our intermediaries placing financial transactions through this service. The team is also dedicated to servicing all types of client account issues, commission payment questions and networking needs, as well as general account inquiries.</p>	<p>1-800-367-0075 (tel.) 1-877-384-3049 (fax) <a href="mailto:ordermail@mfs.com">ordermail@mfs.com</a> (email)</p>
<p><b>Dealer File Administration</b> This group will assist you with block transfers, firm mergers and conversions, branch address updates and registered rep updates.</p>	<p>All requests can be faxed or emailed to: 1-877-465-3257 (fax) <a href="mailto:dealerfile@mfs.com">dealerfile@mfs.com</a> (email)</p>

**Adjustments**

This group will assist with processing adjustments for accounts that receive letters of instruction with indemnification language.

All requests can be faxed or emailed to:  
1-888-745-4825 (fax)  
[ordermail@mfs.com](mailto:ordermail@mfs.com) (email)



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