



For Immediate Release

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MFS® LAUNCHES GLOBAL OPPORTUNISTIC FIXED INCOME TRUST

Globally diversified, multisector, flexibly managed fixed income portfolio

SYDNEY (2 December 2019) - MFS Investment Management® is pleased to announce the launch of the MFS Global Opportunistic Fixed Income Trust, a flexible instrument designed to generate returns from diverse sources of alpha in a variety of market conditions.

The trust takes an integrated research approach, striving to identify inefficiencies in global fixed income markets. It seeks out a broad range of opportunities to add value, including those involving global sector allocation, security selection, duration and currency management over a full market cycle.

The trust focuses on issuers located in developed markets, but may also invest in the emerging markets. It invests in corporate and government issuers and mortgage-backed and other asset-backed securities, as well as investment-grade and below-investment-grade debt instruments. Through this global opportunity set, the fund aims to allocate risk where it is most attractively priced in order to generate returns.

The trust launch follows demand from Findex, one of Australasia's leading providers of integrated financial advisory and accounting services.

While the portfolio has the ability to allocate to various sectors, including riskier segments of the fixed income markets, the trust uses a benchmark-aware approach that seeks to balance higher yield and total return potential while still providing the diversification benefits traditionally offered by fixed income.

Commenting on the launch, **Ross Cartwright, managing director, head of retail, Australia and New Zealand**, said, 'With Australian interest rates at a record low, using a global approach to seek additional sources of income and improved risk/reward in fixed income is becoming more important. In our view, alpha will play a larger role in overall total returns going forward. Having a manager who can use a global opportunity set to allocate across the asset class enhances efforts to generate performance'.

'We are delighted to work with Findex to bring the MFS Global Opportunistic Fixed Income Trust to Australia. We share their passion for providing clients' unmatched expertise and robust financial solutions that will ultimately see them reach their financial goals', he added.

Pilar Gomez-Bravo and Robert Spector serve as the trust's lead managers and are responsible for asset allocation and risk budgeting in the portfolio. They work with a group of sector-level portfolio managers who, in addition to providing insights on relative value for their sectors, are also responsible for buy and sell recommendations therein.

Owen Murfin is the institutional portfolio manager overseeing the trust. In this role, he advises and communicates on the management of the trust.

This highly experienced team has a long track record of managing global portfolios, with extensive investment experience in various asset classes and regions around the world.

The trust is available to both institutional and wholesale clients in Australia and New Zealand.

About MFS Investment Management

Established in 1924, MFS® is an active, global asset manager with investment offices in Boston, Hong Kong, London, Mexico City, São Paulo, Singapore, Sydney, Tokyo and Toronto. We employ a uniquely collaborative approach to build better insights for our clients. Our investment approach has three core elements: integrated research, global collaboration and active risk management. As at October 31, 2019, MFS manages US\$501.0 billion in assets on behalf of individual and institutional investors worldwide.

Important risk considerations

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