

Sun Life Granite Managed Solutions

BROAD DIVERSIFICATION | MULTI-MANAGER APPROACH | TACTICAL ASSET ALLOCATION

Fund name (Series F)	MORNINGSTAR OVERALL RATING™	SINCE INCEPTION Return %	10 YEAR Return %	5 YEAR Return %	3 YEAR Return %	1 YEAR Return %	YTD Return %	INCEPTION DATE
Global Equity Balanced								
Sun Life Granite Growth Portfolio F	★★★★★	8.3	7.0	6.4	4.3	11.1	4.0	2012-01-17
Sun Life Granite Balanced Growth Port F	★★★★	7.5	6.2	5.6	3.4	10.1	3.3	2012-01-17
Global Neutral Balanced								
Sun Life Granite Balanced Portfolio F	★★★★★	6.7	5.5	4.8	2.5	9.1	2.7	2012-01-17
Sun Life Granite Moderate Portfolio F	★★★★	5.8	4.7	3.9	1.7	8.3	2.1	2012-01-17
Tactical Balanced								
Sun Life Granite Enhanced Income Port F	★★★★	4.6	4.0	3.6	2.6	6.1	1.5	2013-01-16
Sun Life Granite Income Portfolio F	★★★★	4.0	3.6	2.9	1.2	5.3	1.0	2013-01-16
Global Fixed Income Balanced								
Sun Life Granite Conservative Port F	★★★	3.8	3.1	2.1	-0.1	6.5	1.0	2012-04-02

Data as of February 29, 2024.

Note: On April 2, 2012, Sun Life Granite Conservative Portfolio underwent a merger that was a material change for the fund under applicable securities laws. As a result of this change, we are only permitted to show performance information for periods after the date of merger.

Series F units are available to investors who have a fee-based account with their dealer and whose dealer has signed an agreement with us.

Sun Life Granite Managed Portfolios invest in mutual funds and/or exchange traded funds (ETFs).

Series A units are available for purchase to all investors, while Series F units are only available to investors who participate in eligible fee-based or wrap programs with their registered dealers. Differences in performance between these series are primarily due to differences in management fees and fixed administration fees. Performance results for Series F units may also appear higher than for Series A units as the management fee does not include the trailing commission. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. The indicated rates of return are the historical annual compounded total returns including changes in units value and reinvestment of all distributions and do not take into account sales, redemption, distribution or optional charges or income taxes payable by any securityholder that would have reduced returns. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

Morningstar Ratings reflect performance as of {asofdate} and are subject to change monthly. The Morningstar Rating shown is for series F; other series may have different performance characteristics. The ratings are calculated from a fund's 3, 5, and 10-year returns measured against 91-day Treasury bill and peer group returns. The top 10% of the funds in a category get five stars. The Overall Rating is a weighted combination of the 3, 5 and 10-year ratings. For greater detail see www.morningstar.ca.

Fund name	Category	Morningstar 3-year rating	# Funds in category	Morningstar 5-year rating	# Funds in category	Morningstar 10-year rating	# Funds in category
Sun Life Granite Growth Portfolio F	Global Equity Balanced	★★★	1,024	★★★	932	★★★★	488
Sun Life Granite Balanced Growth Port F	Global Equity Balanced	★★	1,024	★★★	932	★★★	488
Sun Life Granite Balanced Portfolio F	Global Neutral Balanced	★★★	1,324	★★★	1,193	★★★★	628
Sun Life Granite Moderate Portfolio F	Global Neutral Balanced	★★	1,324	★★	1,193	★★★	628
Sun Life Granite Enhanced Income Port F	Tactical Balanced	★★★	281	★★★	261	★★★	110
Sun Life Granite Income Portfolio F	Tactical Balanced	★★	281	★★	261	★★★	110
Sun Life Granite Conservative Port F	Global Fixed Income Balanced	★★	772	★★	689	★★★	303

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