

# MFS Mid Cap Growth R3

**Investment Style:**

Mid-Cap Growth

**Investment Objective:**

Growth

**Investment Strategy:**

The investment seeks capital appreciation. The fund invests at least 80% of the fund's net assets in issuers with medium market capitalizations. MFS generally defines medium market capitalization issuers as issuers with market capitalizations similar to those of issuers included in the Russell Midcap® Growth Index over the last 13 months at the time of purchase.

**Fund Family:**

MFS

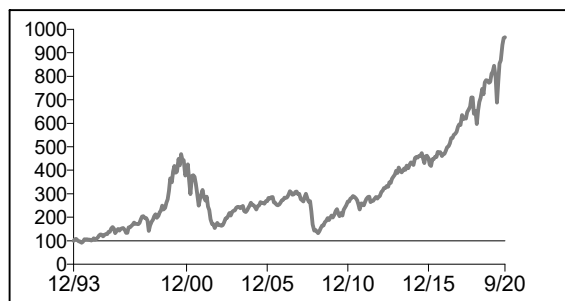
**Inception Date:**

12/1/1993

**Ticker Symbol:**

OTCHX

**Growth of \$100 (Since Inception)**



The performance figures represent past performance. Past performance does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted. Call toll-free at 800-225-2606 to obtain performance data current to the most recent month-end. Returns less than one year are cumulative. Performance prior to the inception date of the share class (if any) is based on returns of an older share class, which have been adjusted for expenses.

Stocks have historically offered the potential for greater long-term returns, but also entail greater short-term risks than other investments. Mid-cap stocks may be more vulnerable to market downturns and their prices could be more volatile than those of larger companies. Most growth investments offer higher potential capital appreciation but usually at above-average risk. Growth stocks can perform differently than other types of stocks and the market as a whole and can be more volatile than other types of stocks.

The information contained herein provides only a summary and will likely not contain all investment strategies, risk disclosures and other important information relevant to the fund. Please refer to the fund's summary prospectus (if available) or prospectus for more complete information about the fund.

\*The net expense ratio reflects the expense ratio of the fund after applicable expense waivers or reimbursements, if any.

**Top Ten Holdings as of 08/31/2020**

Cadence Design Systems Inc	2.8%
PerkinElmer Inc	2.4%
Take-Two Interactive Software Inc	2.3%
Bright Horizons Family Solutions Inc	2.3%
MSCI Inc	2.2%
Verisk Analytics Inc	2.2%
Monolithic Power Systems Inc	2.1%
Clarivate PLC Ordinary Shares	2.0%
IHS Markit Ltd	1.8%
Steris PLC	1.8%

**Sector Diversification (%) as of 08/31/2020**

Basic Materials	3.2
Communication Services	7.4
Consumer Cyclical	13.1
Consumer Defensive	0.3
Healthcare	20.5
Industrials	14.9
Real Estate	4.4
Technology	29.1
Energy	0.0
Financial Services	7.1
Utilities	0.0

**Portfolio Profile as of 08/31/2020**

Net Assets \$MM	455.00
Total Number of Holdings	98.00
Turnover Ratio (%)	21.00
Portfolio Price/Earnings Ratio	40.54
Average Market Cap. (mil.)	18930.07

Portfolio Price/Earnings Ratio relates the price of the stock to the prior 12 month per-share earnings of the company.

© 2020 Morningstar, Inc. All Rights Reserved. This information is being provided as a service by Transamerica Retirement Solutions to plans whose participants may invest in the fund, and may differ from information provided by other sources. The information contained herein: (1) is proprietary to Morningstar and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information.

For more information on any registered fund, please call 800-755-5801 for a free summary prospectus (if available) and/or prospectus. You should consider the objectives, risks, charges, and expenses of an investment carefully before investing. The summary prospectus and prospectus contain this and other information. Read them carefully before you invest. This fund is offered and distributed by the fund family and its affiliated broker-dealer or other broker-dealers with effective selling agreements, such as Transamerica Investors Securities Corporation (TISC), 440 Mamaroneck Avenue, Harrison, NY 10528. Transamerica Retirement Solutions is an affiliate of TISC.