

SUN LIFE **TACTICAL ETF PORTFOLIOS**

INVESTOR GUIDE

In today's environment, the popularity of exchange-traded funds (ETFs) has exploded as investors demand lower cost investments.

However, picking – and combining – the right ETFs isn't easy.

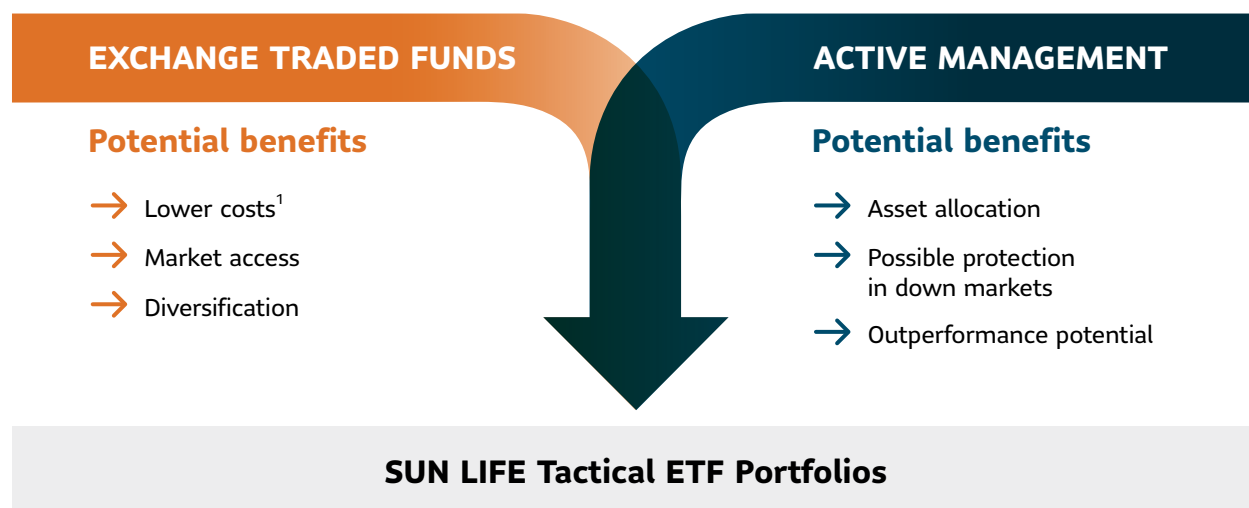
There are hundreds of products, it takes knowledge, and you need to respond to market changes to build your portfolio. It's hard. So why worry about it?

Sun Life Tactical ETF Portfolios can help.

Sun Life Tactical ETF Portfolios

Sun Life Tactical ETF Portfolios are a suite of five diversified mutual fund portfolios that bring together the best features of two investment approaches – ETFs and active management.

The power of ETFs. The skills of active management. Combined.



ETFs. The ETFs in each portfolio can offer benefits like lower investment costs¹, access to specific markets, and diversification.

Active management. Active management may provide additional performance potential:

- Professional asset allocation can help diversify your investment and capitalize on opportunities
- Active managers can potentially outperform market indexes
- Active investment strategies can potentially help protect portfolios when markets fall

Together, it's a powerful strategy.

¹ETFs that passively track market indexes often are associated with lower investment costs compared to actively managed mutual funds. You cannot invest directly in an index.

What sets Sun Life Tactical ETF Portfolios apart?

Each Sun Life Tactical ETF Portfolio invests in a carefully selected mix of ETFs² – all packaged into a convenient mutual fund structure.

These portfolios give four key benefits:



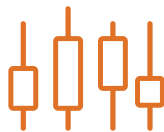
A WORLD OF CHOICE

We can choose ETFs from any provider in the world, without any bias.



DIVERSIFIED

Each portfolio is diversified to maximize its return potential, while minimizing risk.



TACTICAL

Our investment team “tactically” adjusts the portfolios to reduce risk or take advantage of short-term changes in the market.



COST-EFFECTIVE

Each portfolio is cost-effective, with management fees starting at 0.45% (for Series F)³

²The Portfolios also may invest in Sun Life Tactical Completion Fund, which is an actively managed fund used for tactical asset allocation purposes. The majority of the Portfolios' assets are invested in ETFs.

³For Series F; Series A starts at 0.95%. Each Fund pays SLGI Asset Management Inc. a management fee for the administrative and investment services it provides for the Funds (including investment management); this fee will reduce your annual returns. Please refer to the prospectus or Fund Facts for more details.

An experienced team – with deep expertise

The investment team that manages Sun Life Tactical ETF Portfolios has extensive experience in building managed portfolios for Canadian investors. In fact – it's all they do.

The Multi-Asset Solutions Team



Chhad Aul, CFA

Chief Investment Officer and Head of Multi-Asset Solutions
SLGI Asset Management Inc.

*Industry experience since 2004
Joined the firm in 2014*



Aly Somani, CFA, CPA, CA

Portfolio Manager, Multi-Asset Solutions
SLGI Asset Management Inc.

*Industry experience since 2007
Joined the firm in 2012*



Christine Tan, CFA

Portfolio Manager, Multi-Asset Solutions
SLGI Asset Management Inc.

*Industry experience since 1997
Joined the firm in 2018*



Anthony Wu, CFA

Portfolio Manager, Multi-Asset Solutions
SLGI Asset Management Inc.

*Industry experience since 2009
Joined the firm in 2015*



Jason Zhang, CFA

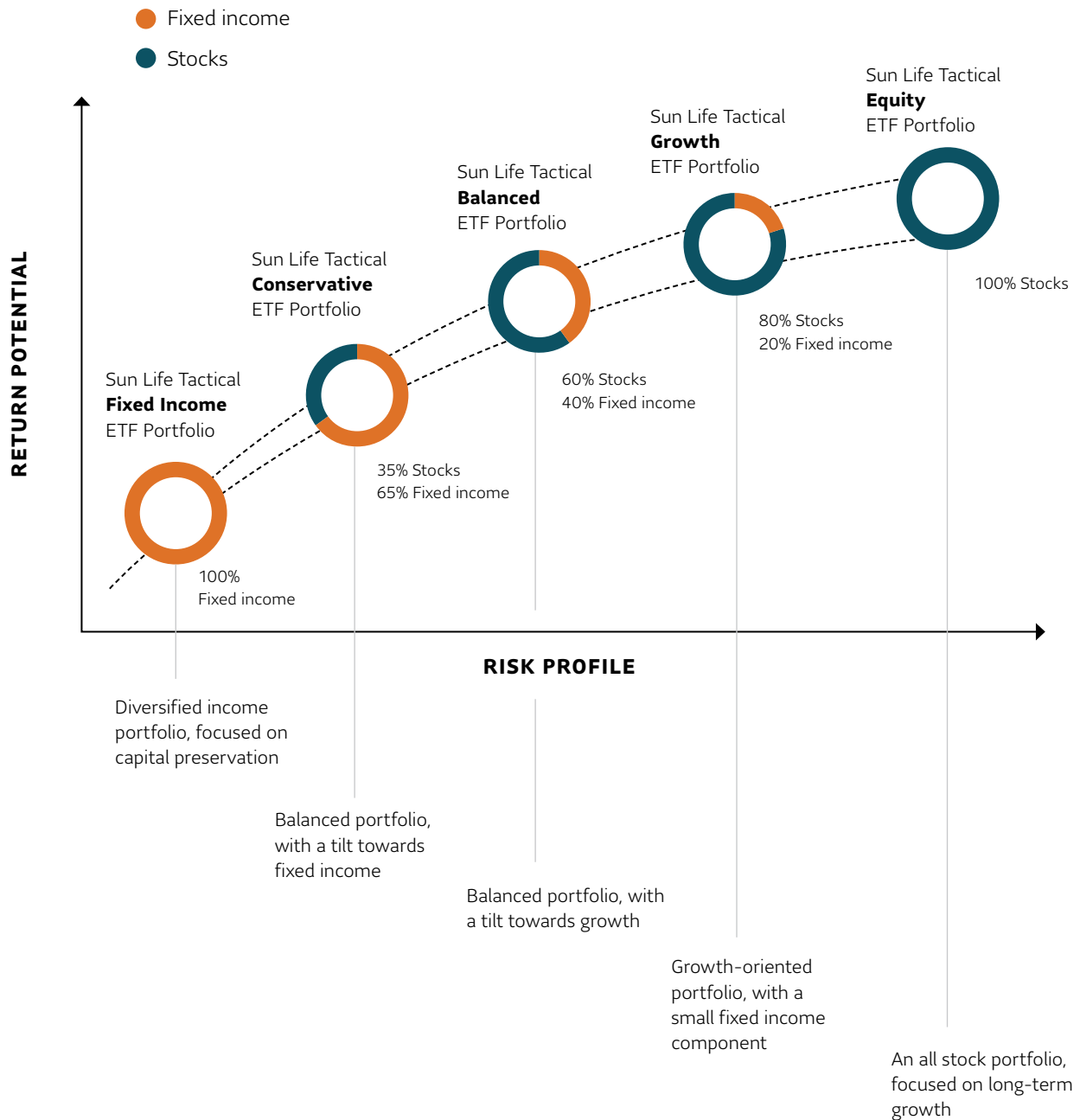
Portfolio Manager, Multi-Asset Solutions
SLGI Asset Management Inc.

*Industry experience since 2007
Joined the firm in 2022*

A dedicated team of analysts and investment professionals supports the portfolio managers, providing research on new investment strategies and market conditions. You can be confident that deep expertise is backing your portfolio.

There's a portfolio built for you

Five portfolios are available, each built to optimize returns within a specific risk profile. Whatever your goals are – or your comfort level – there is a portfolio to match your needs.





**Not sure what
portfolio is right?**

The good news is you don't
have to worry about it...

Getting started is easy

Ask your financial advisor to guide you through our simple questionnaire and discover which Sun Life Tactical ETF Portfolio fits you best.

Once you and your advisor determine the best portfolio match, we'll take care of the rest and help set you on your path to reach your financial goals.

Did you know?

All five of the Sun Life Tactical ETF Portfolios are also available in our Guaranteed Investment Fund (GIF) lineup.

These **Sun Life GIFs Tactical ETF Portfolios** offer the guarantee options and estate planning advantages of an insurance contract. Ask your financial advisor.

Key terms

ETF: An exchange-traded fund (ETF) is a type of investment that typically tracks a market index or other asset. They are bought and sold on a stock exchange like regular stocks.

Active management

means a professional money manager invests on your behalf, making decisions on what to buy or sell. The goal is usually to outperform a market index.

Asset allocation

is an investment strategy that diversifies your investments into different asset classes like stocks, bonds or cash. The goal is to balance the return or risk you may experience.

About Sun Life Global Investments

Sun Life Global Investments offers Canadians a diverse lineup of mutual funds, portfolio solutions and guaranteed investments, empowering them to pursue their financial goals at every life stage. We bring together the strength of one of Canada's most trusted names in financial services with some of the best asset managers from around the world to deliver a truly global investment platform. For more information, please visit sunlifeglobalinvestments.com or follow us on Twitter @SLGI_Canada.



For more information, speak to your advisor or:

Visit sunlifeglobalinvestments.com | Call **1-877-344-1424**

Email info@sunlifeglobalinvestments.com

FOR INVESTOR USE

Sun Life Tactical ETF Portfolios are mutual fund trusts that invest in a portfolio of ETFs and mutual funds; they are actively managed by SLGI Asset Management Inc.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

Sun Life Global Investments is a trade name of SLGI Asset Management Inc., Sun Life Assurance Company of Canada, and Sun Life Financial Trust Inc. SLGI Asset Management Inc. is the investment manager of the Sun Life Mutual Funds, Sun Life Granite Managed Solutions and Sun Life Private Investment Pools. Sun Life Assurance Company of Canada is the issuer of guaranteed insurance contracts, including Accumulation Annuities (Insurance GICs), Payout Annuities, and Individual Variable Insurance Contracts (Sun Life GIFs). Any amount that is allocated to a segregated fund is invested at the risk of the contract owner and may increase or decrease in value.

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