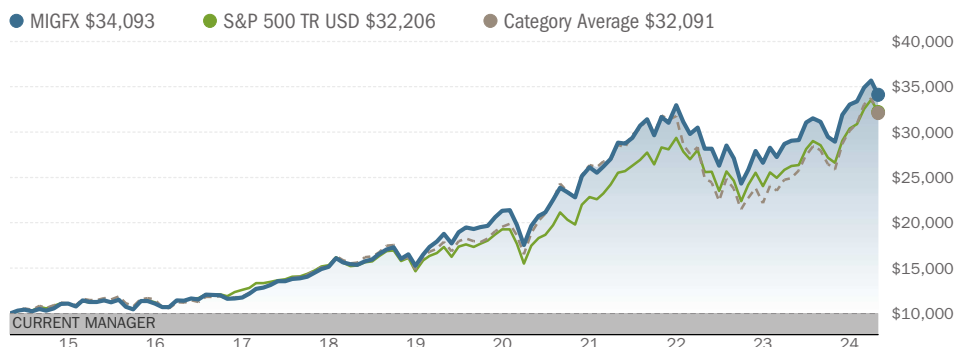


MFS Massachusetts Investors Growth Stock Fund Class A **MIGFX**NO LOAD
NO FEESchwab Mutual Fund OneSource®
(no-load, no-transaction-fee)**GROWTH OF A HYPOTHETICAL \$10,000 INVESTMENT**

as of 4/30/2024

This fund has multiple managers, view MIGFX quote page for complete information.



This graph represents the growth of a hypothetical investment of \$10,000. It assumes reinvestment of dividends and capital gains, and does not reflect sales loads, redemption fees or the effects of taxes on any capital gains and/or distributions.

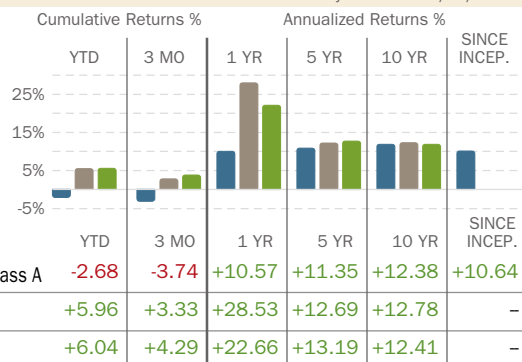
CATEGORY: LARGE GROWTH

Morningstar Category: Large-growth portfolios invest primarily in big U.S. companies that are projected to grow faster than other large-cap stocks. Stocks in the top 70% of the capitalization of the U.S. equity market are defined as large cap. Growth is defined based on fast growth (high growth rates for earnings, sales, book value, and cash flow) and high valuations (high price ratios and low dividend yields). Most of these portfolios focus on companies in rapidly expanding industries.

PERFORMANCE RETURNS ^{1,2}

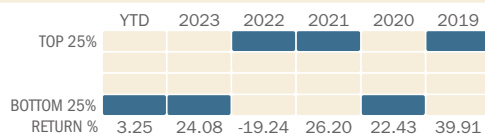
This section contrasts MIGFX to its benchmarks.

Monthly data as of 04/30/2024

**RANK WITHIN CATEGORY FOR ANNUAL TOTAL RETURN %**

as of 04/30/2024

Rank within Category compares this fund's total annual return to that of other funds in the same category, and its figures are not adjusted for load, sales charge, or taxes.



¹ Numbers are adjusted for possible sales, charges, and assume reinvestment of dividends and capital gains over each time period.

² Index figures do not reflect deductions for fees or expenses

Data and rankings provided by Morningstar. Morningstar proprietary ratings reflect historical risk-adjusted performance as of 04/30/24. These ratings are subject to change every month. For each fund with at least a three-year history, Morningstar calculates a Morningstar Rating™ based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a fund's monthly performance (including the effects of sales charges, loads and redemption fees), placing more emphasis on downward variations and rewarding consistent performance. (Each share class is counted as a fraction of one fund within this scale and rated separately, which may cause slight variations in the distribution percentages.) The top 10% of the funds in an investment category receive 5 stars, 22.5% receive 4 stars, 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The overall Morningstar Rating is a weighted average of the funds' three-, five-, and 10-year (if applicable) Morningstar rating metrics. To contact Morningstar, Inc. call 1-800-735-0700.

One or more investments in your plan may be subject to a Contingent Redemption Fee. In addition, some mutual fund companies have strict policies on excessive trading and expressly prohibit transactions deemed detrimental to long-term shareholders of the fund. **Investors should consider carefully information contained in the prospectus, including investment objectives, risks, trading restrictions, charges and expenses. You can request a prospectus by calling Schwab at 1-800-435-4000. You may also request a prospectus at www.schwab.com/workplace. Please read the prospectus carefully before investing.**

Performance data quoted represents past performance and does not indicate future results. Visit www.schwab.com/workplace for month-end performance information. Current performance may be lower or higher. Investment value will fluctuate, and shares when redeemed, may be worth more or less than original cost. Please visit <http://www.schwab.com/workplace> for more recent performance information.

FUND PROFILE

as of 04/30/24

Available at Schwab	Yes
Inception Date	01/01/1935
Status	Open
Category	Large Growth
Index Fund	No
Fund Company	MFS
Portfolio Turnover	20%

MORNINGSTAR RATINGS

as of 04/30/24

Overall rating OUT OF 1109 FUNDS



3 year rating OUT OF 1109 FUNDS



5 year rating OUT OF 1036 FUNDS



10 year rating OUT OF 810 FUNDS

Historical Return
AVERAGE
RETURNHistorical Risk
LOW
RISK

The ratings reflect historical risk-adjusted performance and the overall Morningstar Rating™ is derived from a weighted average of the performance figures associated with fund's 3, 5, and 10 year rating metrics.

QUARTERLY AVERAGE ANNUAL TOTAL RETURN

as of 03/31/2024

1 Year	17.30%	10 Years	12.88%
5 Years	13.42%	Since Incep.	10.78%

Numbers are adjusted for possible sales charges, and assume reinvestment of dividends & capital gains over each time period.

EXPENSES

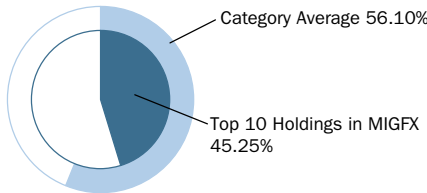
Gross Expense Ratio (before waivers)	0.71%
Net Expense Ratio (after waivers)	0.71%
Category Average Expense Ratio	0.95%
12b-1 Fees	0.25
Max Front Load	5.75
Max Back Load	None
Redemption Fee	NA

A net expense ratio lower than the gross expense ratio may reflect a cap on or contractual waiver of fund expenses. Please read the fund prospectus for details on limits or expiration dates for any such waivers.

MFS Massachusetts Investors Growth Stock Fund Class A **MIGFX**NO LOAD
NO FEESchwab Mutual Fund OneSource®
(no-load, no-transaction-fee)

TOP TEN HOLDINGS

as of 03/31/2024



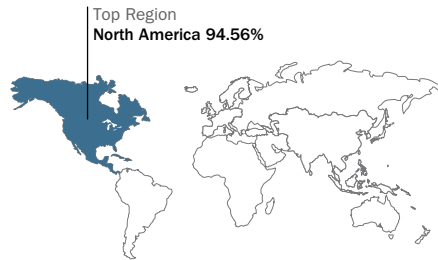
Top 10 holdings are 45.25% of the total portfolio assets. The category average percent of Portfolio in top 10 holdings is 56.10%

SYMBOL	COMPANY NAME	SECTOR	PERCENT OF ASSETS
MSFT	Microsoft Corp	Information Technology	13.97%
GOOGL	Alphabet Inc Class A	Communication Servi..	5.15%
AAPL	Apple Inc	Information Technology	4.71%
V	Visa Inc Class A	Financials	4.49%
NVDA	NVIDIA Corp	Information Technology	3.90%
ACN	Accenture PLC Class A	Information Technology	3.34%
APH	Amphenol Corp Class A	Information Technology	2.61%
AON	Aon PLC Class A	Financials	2.44%
CHD	Church & Dwight Co Inc	Consumer Staples	2.35%
A	Agilent Technologies Inc	Health Care	2.29%

Fund holdings subject to change

REGIONAL EXPOSURE

as of 03/31/2024

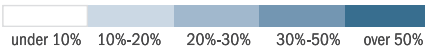


Regional Breakdown

North America	94.56%
Europe Developed (excluding UK)	2.15%
Asia Developed (excluding Japan)	1.81%
Asia Emerging	1.48%

Top 5 Countries

United States	92.43%
France	2.15%
Canada	2.14%
Taiwan	1.81%
China	1.48%



This Mutual Fund Report Card is informational in nature and is not a recommendation or solicitation for any person to buy, sell or hold any particular security; nor is it intended to address any individual's investment objectives, financial situation or personal circumstances. We recommend that investors define their goals, risk tolerance, time horizon and investment objectives in addition to researching possible investment choices.

Sector weightings for fund portfolios are determined using the Global Industry Classification Standard (GICS). GICS was developed by and is the exclusive property of Morgan Stanley Capital International Inc. and Standard & Poor's. GICS is a service mark of MSCI and S&P and has been licensed for use by Charles Schwab & Co., Inc.

Government bond fund shares are not guaranteed. Their price and investment return will fluctuate with market conditions and interest rates. Investment income from municipal bond funds may be subject to certain state and local taxes and the federal alternative minimum tax. Capital gains are not exempt from federal income tax.

International investing involves special risks such as currency fluctuation and political instability. Investing in emerging markets may accentuate these risks. Small cap funds are subject to greater volatility than those in other asset categories. Due to the limited focus of sector funds, they may experience greater volatility than funds with a broader investment strategy.

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For participants who utilize the Personal Choice Retirement Account (PCRA)®, the following fees and conditions may apply: Schwab's short-term redemption fee of \$49.95 will be charged on redemption of funds purchased through Schwab's Mutual Fund OneSource® service (and certain other funds with no transaction fee) and held for 90 days or less. Schwab reserves the right to exempt certain funds from this fee, including Schwab Funds®, which may charge a separate redemption fee, and funds that accommodate short-term trading.

The Laudus Group® of Funds includes the Laudus Mondrian and Laudus Growth Investors Funds, which are part of the Laudus Trust and Laudus Institutional Trust and distributed by ALPS Distributors, Inc., and the Laudus MarketMasters Funds®, which are part of the Schwab Capital Trust and distributed by Charles Schwab & Co., Inc. ALPS Distributors, Inc. and Charles Schwab & Co., Inc. are unaffiliated entities. Fund investment adviser: Charles Schwab Investment Management, Inc. (CSIM). Distributor: Charles Schwab & Co., Inc. (Schwab). CSIM and Schwab are separate but affiliated companies and subsidiaries of The Charles Schwab Corporation. The aggregate fees Schwab or its affiliates receive from Schwab Affiliate Funds are greater than the remuneration Schwab receives from other fund companies participating in the Mutual Fund OneSource Service.

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SECTOR WEIGHTINGS

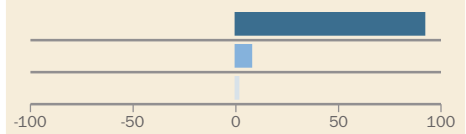
as of 03/31/2024

Information Technology	36.95%
Financials	14.52%
Health Care	13.00%
Telecommunication Services	8.81%
Consumer Discretionary	8.78%
Industrials	7.82%
Consumer Staples	6.50%
Materials	1.25%
Utilities	0.71%



ASSET BREAKDOWN

as of 03/31/24



	%Long	%Short	%Net
Domestic Stock	91.77	0.00	91.77
Non-US Stock	7.52	0.00	7.52
Cash	0.70	0.00	0.70

Non-US assets includes assets without a specific country classification.

MARKET CAPITALIZATION

as of 03/31/2024

Giant Cap	40.48%
Large Cap	37.38%
Medium Cap	22.14%

