



For Immediate Release

Contacts: [Dan Flaherty](#), 1-617-954-4256

## MFS ENTERS ACTIVE ETF MARKET

### MFS Launches Five Actively Managed ETFs, Bringing Capabilities Honed Over a Century of Investing to the Burgeoning Active ETF Market

**BOSTON (December 5, 2024)** – MFS® today launched the firm’s first actively managed exchange-traded funds, marking its entry into the fast-growing active ETF market, which now accounts for nearly \$700 billion in assets in the United States.<sup>1</sup>

The following five actively managed ETFs began trading on the New York Stock Exchange today:

- MFS® Active Value ETF (NYSE: MFSV)
- MFS® Active Growth ETF (NYSE: MFSG)
- MFS® Active International ETF (NYSE: MFSI)
- MFS® Active Core Plus Bond ETF (NYSE: MFSB)
- MFS® Active Intermediate Muni Bond ETF (NYSE: MFSM)

Commenting on the launch, Michael Roberge, CEO and chair of MFS, said, “Since the creation of the mutual fund a hundred years ago, MFS has continually evolved how we deliver long-term value to our clients. These new active ETFs are an exciting next step in that journey. They bring the firm’s capabilities to this market for the first time. The ETFs give investors greater choice, allowing them to access MFS’ investment capabilities across five popular investment categories: US Value, US Growth, International Equity, US Core Plus and Intermediate Muni Bond.”

The new active ETFs represent a well-diversified mix of popular MFS investment capabilities and will be distinct, fully transparent portfolios, disclosing holdings daily. Authorized participants will benefit from the support of a dedicated MFS ETF capital markets team in addition to market-leading trading and liquidity support from the NYSE.

“Today, as investors’ needs become more diverse and complex, we are pleased to be able to offer this next level of vehicle choice. These new active ETFs complement our existing lines of mutual funds, retail separately managed accounts and other investment vehicles and provide significant choice for investors building long-term, diversified portfolios,” added Roberge.

Each of MFS’ active ETF strategies are managed by teams of experienced investment professionals, who bring the same disciplined, long-term active approach that has been the firm’s hallmark since its founding in 1924. More information about MFS’ active ETFs can be found on [MFS.com](#).

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<sup>1</sup> Source: ISS Market Intelligence Simfund, as of September 30, 2024. Total active long-term US ETF assets were \$687.4 billion.

### **About MFS Investment Management**

In 1924, MFS launched the first US open-end mutual fund, opening the door to the markets for millions of everyday investors. Today, as a full-service global investment manager serving financial advisors, intermediaries and institutional clients, MFS still serves a single purpose: to create long-term value for clients by allocating capital responsibly. That takes our powerful investment approach combining collective expertise, thoughtful risk management and long-term discipline. Supported by our culture of shared values and collaboration, our teams of diverse thinkers actively debate ideas and assess material risks to uncover what we believe are the best investment opportunities in the market. As of October 31, 2024, MFS manages US \$626.4 billion in assets on behalf of individual and institutional investors worldwide. Please visit [mfs.com](https://mfs.com) for more information.

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