

# MFS® McLean Budden<sup>SM</sup> Private Wealth: Fund Performance

Periods Ending January 31, 2012

Annualized (%)	QTR	1YR	2YR	3YR	4YR	5YR	6YR	7YR	8YR	9Yr	10YR
MB Canadian Equity Growth	0.8	-18.9	1.3	12.8	-1.9	-1.0	1.7	5.4	5.8	8.6	6.0
MB Canadian Equity	1.3	-12.7	5.0	13.5	0.6	0.8	2.9	6.2	6.6	8.8	6.8
MB Canadian Equity Value	1.7	-6.8	8.5	14.2	2.7	2.4	3.9	6.7	7.2	8.9	7.6
McLean Budden Dividend Income*†	3.3	8.4	14.4	19.3	6.4	4.7	NA	NA	NA	NA	NA
BMO/TSX Comp. CAP 10% Index <sup>1</sup>	2.4	-5.6	8.8	16.0	1.6	1.9	3.5	7.2	7.5	10.0	7.5
McLean Budden American Equity†	6.3	-1.2	4.2	8.6	-0.6	-3.2	0.1	0.4	NA	NA	NA
S&P 500 Index C\$	6.6	4.5	9.6	11.3	1.1	-2.8	0.4	0.6	0.4	2.1	-1.1
MB International Equity	1.4	-6.5	-0.5	7.5	-2.2	-5.2	-0.7	1.1	1.5	3.8	1.3
MSCI EAFE Index C\$	0.5	-8.9	-0.3	6.3	-4.3	-6.4	-1.9	0.2	1.3	3.9	1.5
MB Global Equity Growth <sup>3</sup>	3.8	-9.4	0.4	9.4	-1.8	-4.8	-1.0	0.1	0.1	1.8	NA
MB Global Equity	3.6	-4.9	1.2	7.3	-1.7	-4.6	-0.8	0.3	0.5	2.5	0.0
MB Global Equity Value <sup>3</sup>	0.8	-10.0	-1.8	4.1	-3.9	-6.6	-2.3	-1.2	-0.5	1.9	NA
MSCI World Index	3.7	-2.2	5.0	9.3	-1.3	-4.2	-0.5	0.8	1.1	3.2	0.3
MB Balanced Growth	2.5	-5.5	3.3	9.7	2.0	1.1	3.0	4.4	4.6	6.1	4.6
MB Balanced	2.6	-1.7	4.8	9.5	2.7	1.6	3.3	4.6	4.9	6.3	5.0
MB Balanced Value <sup>2</sup>	1.6	-1.9	4.5	8.4	2.4	1.2	2.9	4.1	4.5	5.8	4.7
Balanced Benchmark <sup>4</sup>	2.9	1.5	7.0	10.6	3.0	2.1	3.5	5.0	5.2	6.7	5.2
MB Balanced Plus	2.7	-0.4	4.3	8.2	2.7	1.2	3.0	3.8	4.1	5.4	4.1
Balanced Plus Benchmark <sup>5</sup>	3.0	2.4	6.6	9.5	3.1	1.8	3.4	4.4	4.6	6.0	4.5
MB Fixed Income	2.5	10.1	7.2	7.8	7.1	6.4	6.2	5.9	6.1	6.4	6.4
DEX Universe Index	3.1	10.7	7.5	7.8	7.0	6.5	6.2	6.0	6.1	6.4	6.5

Calendar Years Ending December 31

Annual (%)	Y-T-D 31/01/12	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002
MB Canadian Equity Growth	7.1	-21.6	16.5	42.2	-37.9	11.6	21.3	22.9	11.9	30.8	-14.1
MB Canadian Equity	5.8	-14.6	16.1	35.7	-31.9	8.4	18.3	21.2	12.2	25.4	-7.1
MB Canadian Equity Value	4.6	-7.6	15.7	29.3	-25.5	5.6	14.0	20.6	12.4	20.8	1.2
McLean Budden Dividend Income*†	-0.4	11.3	14.3	29.0	-24.8	1.4	NA	NA	NA	NA	NA
BMO/TSX Comp. CAP 10% Index <sup>1</sup>	4.4	-8.7	17.6	35.1	-33.0	9.8	17.3	24.1	14.5	26.7	-12.4
McLean Budden American Equity†	3.8	-1.7	4.4	11.4	-21.6	-4.7	14.9	3.0	3.9	NA	NA
S&P 500 Index C\$	3.3	4.4	9.3	8.1	-21.9	-10.5	15.7	1.6	3.3	5.3	-22.7
MB International Equity	4.4	-8.0	0.2	17.0	-22.6	-9.5	26.5	9.1	8.1	11.7	-17.2
MSCI EAFE Index C\$	4.1	-9.7	2.8	13.2	-29.4	-5.3	26.8	10.4	12.4	13.9	-16.3
MB Global Equity Growth <sup>3</sup>	6.4	-11.6	4.1	22.3	-26.6	-7.9	19.0	6.3	4.4	4.3	NA
MB Global Equity	4.1	-5.9	2.0	13.4	-21.7	-7.8	19.7	5.7	5.5	8.5	-17.6
MB Global Equity Value <sup>3</sup>	2.2	-8.3	1.0	8.6	-20.3	-10.6	20.3	5.6	8.1	11.1	NA
MSCI World Index	3.8	-2.9	6.8	11.8	-26.1	-7.1	20.6	6.6	7.3	9.4	-20.2
MB Balanced Growth	4.4	-7.5	8.9	20.8	-17.5	2.1	13.7	11.4	8.5	14.4	-6.9
MB Balanced	3.4	-3.2	8.2	16.7	-14.2	1.3	12.9	10.9	8.9	13.4	-4.4
MB Balanced Value <sup>2</sup>	2.3	-1.9	7.6	13.2	-11.5	-0.5	11.8	10.6	9.3	12.3	-2.2
Balanced Benchmark <sup>4</sup>	2.6	-0.1	9.8	15.8	-16.4	2.5	12.5	12.0	9.5	13.7	-6.2
MB Balanced Plus	3.0	-1.6	6.4	12.6	-10.2	-1.2	12.4	8.3	7.8	11.2	-5.0
Balanced Plus Benchmark <sup>5</sup>	2.4	1.2	8.6	12.4	-13.1	0.5	12.4	9.4	8.6	11.5	-6.4
MB Fixed Income	0.7	8.9	6.9	6.1	7.0	2.6	4.1	6.4	7.7	6.5	8.0
DEX Universe Index	0.5	9.7	6.7	5.4	6.4	3.7	4.1	6.5	7.1	6.7	8.7

<sup>1</sup> The BMO/TSX Composite CAP 10% Index began on May 1, 2002 and is provided by BMO Nesbitt Burns. In it, no security is more than 10% of the total index.

<sup>2</sup> The MB Balanced Value Fund was started August 2001.

<sup>3</sup> The MB Global Equity Growth Fund and MB Global Equity Value Fund were started July 2002.

<sup>4</sup> The Balanced Benchmark is comprised of 30% BMO/TSX CAP 10% Index,

35% DEX Universe Bond Index, 30% MSCI World Index and 5% DEX 91 day T-Bill Index.

<sup>5</sup> The Balanced Plus Benchmark is comprised of 35% MSCI World, 20% BMO/TSX CAP 10% Index, 35% DEX Universe Bond Index, 5% Citigroup Broad Investment Grade Bond Index (ex-Mortgages) and 5% DEX 91 day T-Bill Index.

<sup>†</sup> Mutual Fund Class C returns shown.

\* Formerly, McLean Budden High Income Equity Fund.

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