

# MFS Meridian Funds - Prudent Capital A1EUR

LU1442549025, LU1442549538, LU1761538575, LU1442548993, LU1529513373

<b>Issuer</b>	-
<b>Fund provider</b>	MFS Investment Management Company (Lux) S.à.r.l.
<b>Fund type/Asset class</b>	Mixed fund
<b>Legal form</b>	SICAV
<b>Fund issue date</b>	03/11/2016
<b>Last Update</b>	16.04.2024
<b>Benchmark</b>	MSCI World Index (USD) and ICE BofA Merrill Lynch 0-3 Month U.S. Treasury Bill Index (USD)
<b>Tranche</b>	Private Investors

<b>Risk Indicator (PRIIP)</b> 3 of 7	<b>Licensed in</b> D, A, CH, LU	<b>Classification by SFDR</b> Article 8	<b>EU Taxonomy</b> -	<b>% of Sustainable Investments according to SFDR</b> -
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## Principal Adverse Impacts



## Sustainable Development Goals

No explicit details regarding the Sustainable Development Goals

## NORMAL ALLOCATION

<b>Equities</b>	50 % to 90 %
<b>Bonds</b>	10 % to 50 %
<b>Money market/Bank deposits</b>	0 %
<b>Commodities</b>	0 %
<b>Direct investments</b>	0 %
<b>Derivatives</b>	0 %
<b>Other</b>	Cash, cash-equivalent instruments and short-term U.S. government securities 10 % to 50 %

## Sustainability approach

<b>Principal Adverse Impacts</b>	<ul style="list-style-type: none"> <li>✓ Greenhouse Gas Emissions</li> <li>✓ Energy Efficiency and Fossil Fuels</li> </ul> <p>MFS investment professionals may consider relevant PAIs within their broader ESG integration framework in the investment process and engagement practices based on financial materiality. PAIs are not treated as separate components nor would PAIs drive investment decisions.</p>
<b>Further remarks on the consideration of SDGs</b>	MFS is supportive of the UN Sustainable Development Goals (SDGs). We consider them to be a useful framework for governments to use to prioritize and evaluate the macroeconomic activities that can reduce and reverse the degradation of environment and society.
<b>Rationale behind classification according to SFDR</b>	Article 8
<b>Engagement</b>	Yes, organized internally <a href="#">Link to engagement policy</a>
<b>Voting</b>	Yes, organized internally <a href="#">Link to voting policy</a>
<b>Best-in/of-Class</b>	No
<b>ESG-Integration</b>	Yes MFS Sustainability Approach: Materiality and integration - Our approach is one of integration with a focus on financial materiality. Evaluating and integrating financially material environmental, social and governance (ESG) factors into our fundamental investment process enables us to consistently identify companies that we believe exhibit sustainable, long-term competitive advantages. Sustainability criteria frequently impact our decisions to invest in or avoid securities.
<b>Norm-based screening</b>	-
<b>Themes</b>	-
<b>Impact Investing</b>	-
<b>Further information on the sustainability approach</b>	In our view, ESG integration is fundamental to skillful active management and it is essential to our sole purpose: to create value for our clients by allocating capital responsibly. <a href="#">Link to sustainability approach</a>

## Research and Transparency

<b>In-house sustainability analysis</b>	Yes, 3 dedicated ESG-analysts, but all our analysts are responsible for incorporating ESG in to their assessments
<b>Research partners</b>	Yes MSCI, Trucost, ISS, RepRisk, Clarity AI Etc.
<b>Percentage of portfolio with sustainability analysis</b>	100 %
<b>Strategically important suppliers included</b>	Yes
<b>Sustainability advisory committee</b>	No
<b>Analysis of portfolio CO2</b>	Yes, both forward and backward-looking indicator We measure and monitor the climate change related risks for portfolio companies.
<b>Sustainability reporting</b>	Yes We are able to provide a variety of security- and portfolio-level ESG related data to our clients upon request. We publicly disclose our firmwide proxy voting records, as well as those for pooled vehicles managed by MFS, on MFS.com. At the firm level, we
<b>At least monthly portfolio publication</b>	Yes <a href="#">Link to monthly portfolio publication</a>
<b>Certification/Label awarded by independent auditors</b>	-

## Environmental

### EXCLUSION OF SECTORS / AREAS OF BUSINESS – COMPANIES

<b>Fossil fuels (Coal, Oil and Gas)</b>	No
<b>Nuclear power (operation and components)</b>	No
<b>Green genetic engineering</b>	No
<b>Chlorine and agrochemicals (biocides)</b>	No
<b>Other</b>	-

## EXCLUSION OF BUSINESS PRACTICES – COMPANIES

Environmentally damaging behaviour	No
Damage to biodiversity	No
Other	-

## EXCLUSION CRITERIA – COUNTRIES

Non-ratification of the Paris Climate Agreement	No
Non-ratification of the Protocol on Biosafety	No
Non-ratification of the UN Biodiversity Convention	No
Nuclear power by proportion of gross energy production	No
Other	-

## Social

### EXCLUSION OF SECTORS / AREAS OF BUSINESS – COMPANIES

Weapons/Armaments	No
Cluster bombs and anti-personnel mines	Yes
Weapons of mass destruction (ABC/CBRN)	No
Tobacco products	No
Pornography	No
Spirits/Alcohol	No
Gambling	No
Other	-

## EXCLUSION OF BUSINESS PRACTICES – COMPANIES

Labour rights (ILO core labour standards)	No
Exploitative child labour	No
Violation of human rights	No
Animal testing	No
Other	-

## EXCLUSION CRITERIA – COUNTRIES

Labour rights	No
Violation of human rights	No
Military spending as a percentage of GDP	N/A
Death penalty, torture	N/A
Countries classified by Freedom House as not free	N/A
Violations of the Nuclear Non-Proliferation Treaty	N/A
Violations of other non-proliferation treaties	N/A
Other	-

## Governance

### EXCLUSION OF BUSINESS PRACTICES – COMPANIES

<b>Corruption and bribery</b>	No
<b>Tax: planned avoidance &amp; detected violations</b>	No
<b>Other</b>	-

### EXCLUSION CRITERIA – COUNTRIES

<b>Corruption</b>	N/A
<b>Other</b>	-

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