



3rd Largest MPF Service Provider in Hong Kong¹
Sun Life has captured 39 MPF Awards including
“Intermediary of the Year”²



BENCHMARK MPF of the Year Awards 2022²



Intermediary of the Year²

The Benchmark “Intermediary of the Year” award recognizes MPF intermediaries that excel product knowledge, technology application, relationship building and marketing techniques better than others in the industry.

BEST-IN-CLASS

- Sponsor Awards - Intermediary Support Award
- Trustee Awards - Member Servicing

OUTSTANDING ACHIEVER

- Top MPF Fund Awards - Global Fixed Income
- Top MPF Fund Awards - Hong Kong Equity
- Top MPF Fund Awards - Lifestyle - (>40-60% Equity)

"The 2023 MPF Awards" by MPF Ratings³



- Gold Rated Scheme
- 1 Silver Rated Scheme
- 2 Bronze Rated Schemes
- 10 Year Consecutive Gold Rating
- Fast Mover
- Socially Responsible
- Environmentally Responsible
- 1 Year Consistent Performer - Bond Fund (RMB)
- 10 Year Consistent Performer - Bond Fund (RMB)
- 15 Year Consistent Performer - Bond Fund (RMB)
- 15 Year Consistent Performer - Equity Fund (HK & China)
- 15 Year Consistent Performer - Mixed Asset Fund (41-60% Equity)
- 15 Year Consistent Performer - Mixed Asset Fund (61-80% Equity)
- 15 Year Consistent Performer - Mixed Asset Fund (81-100% Equity)
- 20 Year Consistent Performer - Equity Fund (Asia)
- 20 Year Consistent Performer - Bond Fund (RMB)
- 20 Year Consistent Performer - Equity Fund (HK & China)
- 20 Year Consistent Performer - Mixed Asset Fund (41-60% Equity)
- 20 Year Consistent Performer - Mixed Asset Fund (61-80% Equity)
- 20 Year Consistent Performer - Mixed Asset Fund (81-100% Equity)

Bloomberg Businessweek (Chinese Edition) Top Fund Awards 2022 Hong Kong⁴



BEST PERFORMER

- Greater China Fund (Aggregated Approach) (MPF - 1 Year)
- Mixed Allocation - Moderate Allocation Fund (MPF - 10 Years)

OUTSTANDING PERFORMER

- Mixed Allocation - Stable Growth Fund (MPF - 1 Year)
- Equity - Hong Kong Fund (MPF - 5 Years)
- Guaranteed Fund (MPF - 5 Years)
- Equity - Hong Kong Fund (MPF - 10 Years)
- Fixed Income - Global Fund (MPF - 10 Years)
- Guaranteed Fund (MPF - 10 Years)

Hong Kong 2023 Refinitiv Lipper Fund Awards⁵



Best Group Award - Overall

The awards recognize outperforming fund group from across all asset classes, including equity, bond and mixed-assets in specific fund award universe of Hong Kong Pension Funds.

- Mixed Asset HKD Aggressive - 10 years

Best Group Award - Equity

The awards recognize outperforming fund group from specific asset of equity in specific fund award universe of Hong Kong Pension Funds.

Banking & Finance Awards 2022 - Excellence Award for MPF Solutions⁶



Assessment Criteria / Award description:

The award is assessed 60% by professional judges and 40% public voting in the criteria of branding image and recognition, market performance, creativity and outstanding performance, strategic development and management.

¹ Based on assets under management. Source: Mercer MPF Market Shares Report (as at March 31, 2023). MPF refers to Mandatory Provident Fund.

² Source: BENCHMARK MPF Awards 2022.

³ Source: "The 2023 MPF Awards" by MPF Ratings

⁴ Source: Bloomberg Businessweek (Chinese edition) Top Fund Awards 2022 Hong Kong.

⁵ Source: Hong Kong 2023 Refinitiv Lipper Fund Awards

⁶ Source: Banking & Finance Awards 2022 - Skypost

Important Note:

This material is for corporate news update purpose only. It is not a recommendation to purchase, sell or hold any particular investment product. Investment involves risks and past performance is not indicative of future performance. Investment return may rise as well as fall.

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