



Sun Life

Captains Fund

Let the industry captains
take charge of your investment



As developments from major industry leaders continue, expect the Philippines to maintain its position as one of the bright spots in Asia in terms of economic stability.

Now's your chance to participate in the strengthening performance of the country and its largest stakeholders.

Introducing Sun Life's *Captains Fund* - a fund that lets you take part in the success stories of the industry captains and lets you enjoy the following benefits:

GROWTH POTENTIAL

With the fund's exposure to publicly-listed local firms that are among the worlds' largest in terms of revenues, profits, assets and market values, there is more opportunity for upside potential earnings.

EFFICIENT ACCESS TO THE CAPTAINS' FORTUNES

Benefit from the success stories of the country's strongest and wealthiest market players without having to put in a big capital or spend a significant amount of time tracking various portfolios.

LIFE INSURANCE COVERAGE

Secure your loved ones' future with guaranteed life insurance protection through your policy's basic plan*.

GUARANTEED ACCEPTANCE FOR SUN MAXILINK ONE

Experience hassle-free application and policy approval through Sun MaxiLink One's Guaranteed Insurability Offer**, subject to the limits of Sun Life. Captains Fund is also available as fund option for all other peso-denominated VUL products via the regular underwriting process.

*Captains Fund is available as a fund option to the following products: Sun MaxiLink One, Sun MaxiLink Bright, Sun MaxiLink Prime, Sun FlexiLink, Sun FlexiLink 1 and Sun FlexiLink Assist.

**For policies issued under the Guaranteed Insurability Offer, coverage shall be limited to the Fund Value plus charges paid, in case of the insured's death within the first 2 years from policy effective date or date of last reinstatement whichever is later, except if death is due to accident.

NOTE: The benefits indicated in this brochure are subject to the specific guidelines set by Sun Life and the actual provisions of the insurance policy contract.

The Fund is designed mainly to generate long-term capital appreciation primarily through investment in equity and equity-linked securities diversified across sectors.

HOW DOES THE FUND WORK?

The Captains Portfolio is carefully selected through careful planning and systematically adhering to the following methodology which will be done on a quarterly basis:

Select the Industry Captains based on the aggregate size of the companies they have controlling interests in



Use the holding companies of the Captains as Portfolio constituents



Apply a liquidity filter on the selected holding companies



Construct the weighted portfolio



CAPTAINS PORTFOLIO

IS THIS FUND FOR YOU?

Captains Fund is as an investment alternative for individuals with longer investment horizon, greater tolerance for risk and are more likely to accept short-term volatility for the opportunity of achieving greater long-term gains. Market volatility should be less of a concern for you.

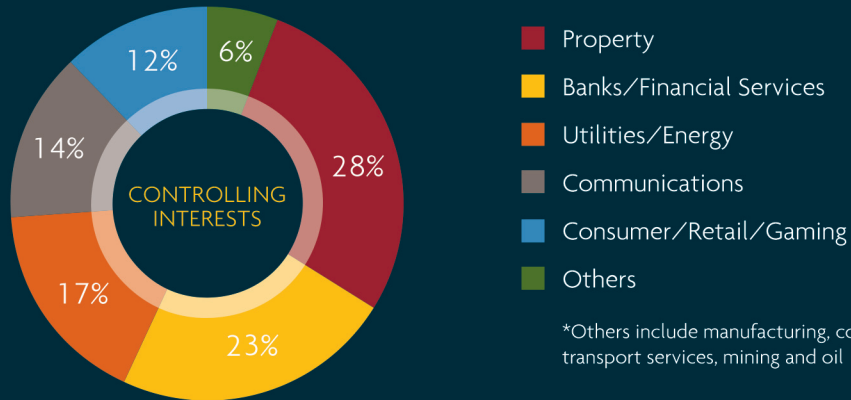
HOW DO I AVAIL OF THIS FUND?

Captains Fund is available as a fund option to any of Sun Life's Peso variable life insurance product that provides you life insurance coverage until age 88, allowing you to enjoy a combined benefit of life insurance protection and wealth accumulation in one financial solution.

REASONS TO INVEST IN CAPTAINS FUND

● INDUSTRY CAPTAINS DOMINATE THE PHILIPPINE MARKET

Business portfolios of Filipino billionaires make up a majority composition of the country's industries.



*Others include manufacturing, construction, transport services, mining and oil

● NATION BUILDING

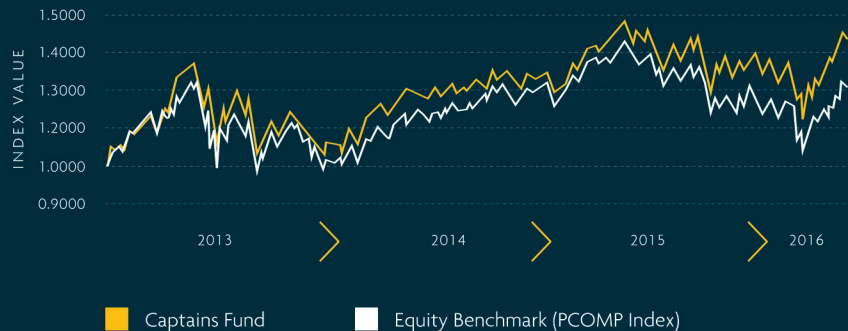
Industry Captains' successes are due to their major contribution in nation building. They essentially built the country as we know today.

● HYPOTHETICAL PORTFOLIO RETURNS

Based on the current methodology, the back test shows that the 3-Year CAGR of the Captains Fund outperforms the Index by 3.95% (Period Covered: Dec.21, 2012 - Mar.31, 2016).

PORTFOLIO	3-YEAR CAGR	DIFFERENCE AGAINST INDEX
PSEI Index	7.09%	
Captains Fund	11.04%	3.95%

CAPTAINS FUND (3-YEAR BACKTEST)



Note: Past performance is not an indication of future results.

Ride the growth potential of the Industry Captains by investing in the Captains Fund TODAY!

Call 849-9888 or contact your Sun Life Advisor.
Visit sunlife.com.ph






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Sun Life of Canada (Philippines), Inc. is regulated by the Philippines' Insurance Commission (IC).

For client assistance, know about our process at sunlife.co/SunLifeCAMS or contact:

 02-8849-9888  sunlink@sunlife.com
 Sun Life Centre, 5th Ave. cor Rizal Drive, BGC Taguig.

For consumer concerns, contact IC (Manila, Cebu & Davao) at

 02-8523-8461 loc 103/127  publicassistance@insurance.gov.ph.

Sun Life is a leading international financial services organization providing asset management, wealth, insurance and health solutions to individual and institutional Clients. Sun Life has operations in a number of markets worldwide, including Canada, the United States, the United Kingdom, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China, Australia, Singapore, Vietnam, Malaysia and Bermuda. As of March 31, 2024, Sun Life had total assets under management of CDN\$1.47 trillion. For more information, please visit www.sunlife.com.

Sun Life Financial Inc. trades on the Toronto (TSX), New York (NYSE) and Philippine (PSE) stock exchanges under the ticker symbol SLF.

In the Philippines, Sun Life is represented by Sun Life of Canada (Philippines), Inc. which offers life insurance products; Sun Life Asset Management Company, Inc. which distributes the Sun Life Prosperity Funds; Sun Life Financial Plans, Inc. which administers the company's education and pension plans; and Sun Life Investment Management & Trust Corporation which offers multi-strategy portfolio management solutions.

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