



DYNAMIC FUND

POWER TO TRANSFORM

Market volatility often holds you back from taking more risks in your investment. But what if there is a fund that lets you adapt to the market and make the most out of each rise and fall?

Introducing **Sun Life's Dynamic Fund** — an adaptive, agile and flexible fund that enables you to perceptively capitalize on market potentials and gives you the power to turn market uncertainties into opportunities. As a fund that is exclusively available to Sun MaxiLink One¹, you reap the benefits of life insurance protection and wealth accumulation potential in one financial solution.

ADAPTIVE *The fund is designed to adapt to prevailing market conditions. Transforming from aggressive, with placements mostly in equities during favorable investment environment, to defensive, with placements shifting mostly to fixed income instruments during adverse market conditions.*

The fund's manageable size allows it to swiftly transition **AGILE**
from equities to fixed income and invest in more issues, from small to large cap.

FLEXIBLE *The fund is able to reallocate its assets +/-90% from equities to fixed income and vice versa, as market opportunities dictate.*

The fund is taken care of by Sun Life's Professional Fund Managers who have the investment experience, research capabilities and commitment to ensure the fund's optimum performance.

**MANAGED
BY PROFESSIONALS**

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.

Transform uncertainty into opportunity through **Sun Life's Dynamic Fund**.

Call 849-9888 or contact your Sun Life Advisor.

Visit sunlife.com.ph

'How do I avail of this fund?

Sun Life's Dynamic Fund is available as a fund option to Sun MaxiLink One, a single pay, Peso-denominated variable life insurance product that provides you with **life insurance coverage** equivalent to at least 125% of the Single Premium less 125% of withdrawals, if any, until age 88. Sun MaxiLink One **has no upfront charges** which allows you to invest fully in the fund and achieve maximum potential returns.

A minimum holding period of 30 days from date of policy issue is required when investing in Sun Life's Dynamic Fund, except when the Cooling-off Provision of the policy is elected.

Sun MaxiLink One
Minimum Single Premium
Ps. 250,000



Issue Ages:

0 (7 days) to 70
for Non-Smoker

16 to 70
for Smoker

Sun Life's Dynamic Fund

Minimum Fund Allocation: **Ps. 50,000**

Fund Availability: Available via Sun MaxiLink One
Benchmark: 50% PSEi + 50% HSBC Liquid Bond Index

Is this fund for you?

Sun Life's Dynamic fund is a financial solution for individuals with moderate to high tolerance for risk and who are looking to diversify their excess liquid assets into financial instruments with potentially higher returns. They aim for wealth accumulation by capitalizing on market opportunities within a medium to long term horizon.

Fund Objective:

Sun Life's Dynamic Fund is designed to provide optimum returns consisting of current income and capital growth through investment in a mix of high quality fixed-income and equity instruments from domestic and foreign issuers. Depending on the state of various world economies and markets, the Fund may invest in non-Philippine investment grade issues.

How Does the Fund Work?

Sun Life's Dynamic Fund adopts a Tactical Asset Allocation approach that allows it to **switch between equities, bonds and cash** within a wide range of established allocation limits when needed. Because it is designed to adapt to prevailing market conditions, it can be **aggressive** during favorable equity market environment with 90% of assets placed in equities and it can be **defensive** during equity market downturns, with up to 100% of assets placed in fixed income securities as deemed appropriate by the fund managers.

Asset Allocation

Fixed Income:
10% to 100%

Equities:
0% - 90%






Call 8-849-9888 or contact your Sun Life Advisors.
Visit sunlife.com.ph for more details.

Connect with us     SunLifePH

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.

This document is issued by Sun Life of Canada (Philippines), Inc. Important information about the product is contained in the policy proposal (available through your Sun Life Advisor) and the insurance policy contract. Should there be any discrepancy between the statement(s) contained in this material and the insurance policy contract, the provisions of the insurance policy contract will prevail.