

# MFS Meridian Funds - U.S. Growth W1 USD

## Categoria Morningstar™

Azione USA Large Cap Growth

## Benchmark Morningstar

Morningstar US Large-Mid Cap Broad  
Growth NR USD  
Usato nel Report

## Benchmark Dichiarato

Russell 1000 Growth NR USD

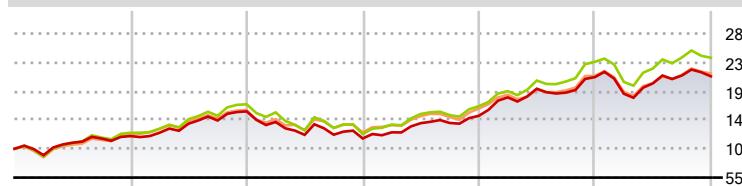
## Morningstar Rating™

★★★

### Obiettivo d'Investimento Dichiarato

The Fund's objective is capital appreciation, measured in U.S. dollars. The Fund invests primarily (at least 70%) in U.S. equity securities. The Fund may also invest in non-U.S. equity securities. The Fund generally focuses its investments in companies it believes to have above average earnings growth potential compared to other companies (growth companies). The Fund generally focuses its investments in larger companies, but may invest in companies of any size. The Fund may invest a relatively large percentage of its assets in a small number of industries or sectors. The Fund will not maintain a material exposure to derivative instruments.

### Rendimenti



	2021	2022	2023	2024	2025	2026-01
Fondo	32,21	-26,73	30,46	39,92	0,64	-2,22
Benchmark e Indici	35,76	-27,38	35,18	41,69	2,70	-0,72
Categorie	29,97	-25,73	29,72	31,37	1,56	-1,14

### Misure di Rischio

3Y Alpha	-1,60	3Y Sharpe Ratio	1,02
3Y Beta	0,95	3Y Std Dev	15,63
3Y R-Squared	94,08	3Y Risk	Med
3Y Info Ratio	-0,86	5Y Risk	Med
3Y Tracking Error	3,64	10Y Risk	-

Basati su Morningstar US Large-Mid Cap Broad Growth NR USD (dove applicabile)

### Rend. Cumulati %

	Fondo	Bmk	Cat
3-Mesi	-8,11	-6,37	-5,67
6-Mesi	-0,62	2,58	2,83
1-Anno	-6,22	-0,75	-3,52
3-Anni Ann.ti	18,24	21,01	16,57
5-Anni Ann.ti	10,71	12,69	8,95
10-Anni Ann.ti	-	-	-

## MFS Meridian Funds - U.S. Growth W1 USD

NAV (03/02/2026)	USD 23,49
Patrimonio Netto (Mln)	99,69 USD
(31/12/2025)	