

Hartford Global Impact Fund

Tickers A: HGXAX C: HGXCX F: HGAFX I: HGXIX R3: HGXRX R4: HGXSX R5: HGXTX R6: HGXXV Y: HGXYX

Inception Date 02/28/2017

Morningstar® Category Global Small/Mid Stock

Lipper Peer Group Global Multi-Cap Core

Market Overview

Global equities rose in the fourth quarter. Stocks rallied in tandem with government bonds as falling inflation in developed markets and weakening economic data across the globe bolstered views that policy rates have peaked and will begin to decline in 2024. The US Federal Reserve (Fed) surprised markets by signaling lower interest rates in 2024, sparking a stock rally that rippled across the globe and increasing speculation for sharp reductions in policy rates across developed markets in 2024. The Fed's policy shift was accompanied by steeper declines in inflation across many economies and a precipitous drop in bond yields, which significantly eased financial pressures on companies, households, and governments. More emerging-market countries began to reduce interest rates in December, while the European Central Bank and the Bank of England pushed back against market forecasts of sizable interest-rate cuts next year despite concerns about weak economic growth.

Performance Summary

- The Hartford Global Impact Fund (I Share) outperformed the MSCI ACWI Index during the quarter
- Security selection contributed to benchmark-relative performance. Strong selection within industrials and consumer discretionary contributed most during the period, while weaker selection in information technology and real estate detracted.
- Sector allocation, a result of our bottom-up stock-selection process, also contributed to benchmark-relative performance. Our lack of exposure to energy and overweight to industrials contributed the most. This was partially offset by an overweight to healthcare, which detracted.
- On a regional basis, security selection within North America contributed most to benchmark-relative performance
- The top relative contributors during the period were an overweight to GoDaddy (information technology) and an out-of-benchmark allocation to PGT Innovations (industrials)

Positioning & Outlook

- While broadly diversified across the Fund's three impact categories and 11 impact themes, at the end of December we had allocated the most capital to the Resource Efficiency, Health, and Financial Inclusion impact themes.
- Looking ahead, we continue to take a diversified approach to portfolio construction across our impact themes. We maintain conviction in increased spend into areas such as Resource Efficiency and Clean Water and Sanitation, as we have expressed in the portfolio throughout this year. We continue to monitor developments in interest-rate policy, as the possibility of lower rates in 2024 would be supportive for this industry as well as our portfolio more broadly given our smaller-cap, growth-oriented factor footprint. We continue to believe our companies are supported by long-term structural demand for innovative products and services seeking to address the world's greatest challenges. We remain ever thankful for your support.

Overall Morningstar Rating™ (I-Share)*



134 Products | Category Based on Risk-Adjusted Returns as of 12/31/2023

Portfolio Managers from Wellington Management

Tara C. Stilwell, CFA

Senior Managing Director
Equity Portfolio Manager
Professional Experience Since 1994

Jason Goins, CFA

Managing Director
Equity Research Analyst
Professional Experience Since 2001

Top Ten Holdings (%)

Xylem, Inc.	3.24
Boston Scientific Corp.	3.04
Abbott Laboratories	2.89
Westinghouse Air Brake Technologies Corp.	2.87
Trane Technologies PLC	2.74
Globe Life, Inc.	2.54
GoDaddy, Inc.	2.50
Hubbell, Inc.	2.49
F5, Inc.	2.10
CyberArk Software Ltd.	2.09
Percentage Of Portfolio	26.50

Holdings and characteristics are subject to change. Percentages may be rounded.

Performance (%)									
Class	QTD	YTD	Average Annual Total Returns					Expenses ¹	
			1 Year	3 Year	5 Year	10 Year	SI	Gross	Net
A	14.59	12.80	12.80	-1.25	9.94	—	8.69	1.26%	1.19%
A with 5.5% Max Sales Charge	—	—	6.60	-3.09	8.70	—	7.79	—	—
F	14.80	13.35	13.35	-0.74	10.51	—	9.22	0.78%	0.69%
I	14.81	13.19	13.19	-0.94	10.33	—	9.08	0.89%	0.89%
R3	14.62	12.61	12.61	-1.46	9.74	—	8.58	1.50%	1.41%
R4	14.72	12.92	12.92	-1.15	10.06	—	8.82	1.17%	1.11%
R5	14.78	13.23	13.23	-0.84	10.35	—	9.09	0.90%	0.81%
R6	14.83	13.46	13.46	-0.72	10.47	—	9.21	0.78%	0.69%
Y	14.77	13.22	13.22	-0.84	10.44	—	9.16	0.89%	0.79%
MSCI ACWI Index	11.03	22.20	22.20	5.75	11.72	—	—	—	—
Morningstar Category	11.06	13.63	13.63	-2.50	9.78	—	—	—	—
Lipper Peer Group	10.92	17.99	17.99	4.63	11.03	—	—	—	—

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Performance data quoted represents past performance and does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted. For more current performance information to the most recent month ended, please visit hartfordfunds.com.

Since Inception (SI) performance is from 2/28/17. Only Class A assesses a sales charge.

MSCI ACWI is a free float-adjusted market capitalization index that measures equity market performance in the global developed and emerging markets, consisting of developed and emerging market country indices. MSCI index performance is shown net of dividend withholding tax. Indices are unmanaged and not available for direct investment.

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¹Expenses as shown in the Fund's most recent prospectus. Gross expenses do not reflect contractual expense reimbursement arrangements. Net expenses reflect such arrangements in instances when they reduce gross expenses. These arrangements remain in effect until 2/29/24 unless the Fund's Board of Directors approves an earlier termination.

*Class I-Shares Star Ratings: 3-year 3 stars out of 134 products, 5-year 4 stars out of 120 products for the period ended herein. Other share classes may have different ratings. The Morningstar Rating™ for funds, or "star rating", is calculated for funds and separate accounts with at least a 3-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. Star rating based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance (without adjusting for any sales load, if applicable), placing more emphasis on downward variations and rewarding consistent performance. 5 stars are assigned to the top 10%, 4 stars to the next 22.5%, 3 stars to the next 35%, 2 stars to the next 22.5%, and 1 star to the bottom 10%. Overall Morningstar Rating is derived from a weighted average of the performance figures associated with its 3-, 5-, and 10-year (if applicable) Morningstar Rating metrics. For more information about the Morningstar Fund Ratings, including their methodology, please go to global.morningstar.com/managerdisclosures. ©2024 Morningstar, Inc. All rights reserved. The information contained herein: (1) is proprietary to Morningstar and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information.

Important Risks: Investing involves risk, including the possible loss of principal. Security prices fluctuate in value depending on general market and economic conditions and the prospects of individual companies. • Small- and mid-cap securities can have greater risks and volatility than large-cap securities. • Foreign investments may be more volatile and less liquid than U.S. investments and are subject to the risk of currency fluctuations and adverse political, economic and regulatory developments. These risks may be greater, and include additional risks, for investments in emerging markets. • The Fund's impact investing focus may cause the Fund to forego certain investment opportunities and underperform funds that do not have a similar focus. The exclusion of certain issuers for reasons other than performance may negatively impact the Fund's performance. • To the extent the Fund focuses on one or more sectors, the Fund may be subject to increased volatility and risk of loss if adverse developments occur.

Investors should carefully consider a fund's investment objectives, risks, charges and expenses. This and other important information is contained in a fund's full prospectus and summary prospectus, which can be obtained by visiting hartfordfunds.com. Please read it carefully before investing.

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