

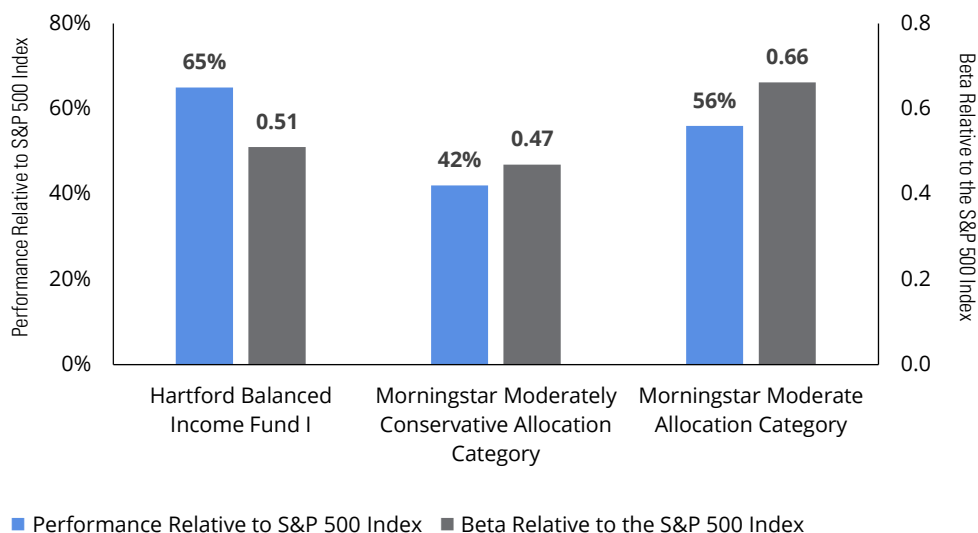
The Hartford Balanced Income Fund focuses on a balance of high-quality, dividend-paying companies and investment-grade debt in pursuit of upside potential and lower relative volatility.

## Top-Decile Performance With Below-Average Volatility

Since its inception, the Hartford Balanced Income Fund has provided 65% of the S&P 500 Index's performance while taking on half the volatility.

The Fund also delivered top-decile performance 100% of the time over all monthly rolling 10-year periods during the same time period.

Performance Relative to the S&P 500 Index



As of 7/31/06- 3/31/25. Past performance does not guarantee future results. Performance relative to the S&P 500 Index is calculated by dividing an investment's return by the return of the S&P 500 over the same time period. Beta is a measure of risk that indicates the price sensitivity of a security or a portfolio relative to a specified market index. S&P 500 Index is a market capitalization-weighted price index composed of 500 widely held common stocks. Indices are unmanaged and not available for direct investment. Source: Morningstar, 4/25.

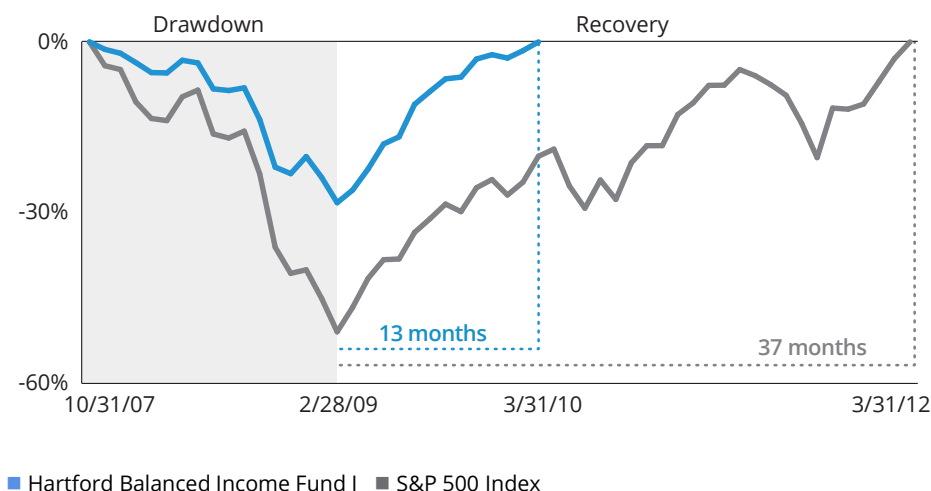
## Less Downside for a Quicker Recovery

Drawdown is the measurement of how much an investment declines from its peak high to its bottom low before recovering.

In the aftermath of the Global Financial Crisis, the Hartford Balanced Income Fund had a max drawdown of 28% versus 51% for the S&P 500 Index, and recovered its value a full two years quicker than the Index.

Source: Morningstar, 4/25.

Max Drawdown and Recovery



# Morningstar Ratings Class I



**Overall Morningstar Rating™<sup>1</sup>**  
426 Products | Moderately  
Conservative Allocation Category  
Based on Risk-Adjusted Returns as  
of 3/31/25



**Morningstar Medalist Rating™<sup>2</sup>**  
as of 9/16/24

## Average Annual Total Returns (%) as of 3/31/25

Hartford Balanced Income Fund	YTD	1 Year	3 Year	5 Year	10 Year	Since Inception	Expenses (%) <sup>3</sup>	
							Net	Gross
Class I	3.01	7.30	3.81	7.75	5.99	6.76	0.65	0.65
Class F	3.03	7.31	3.87	7.83	6.06	6.79	0.56	0.56
Class R6	2.98	7.35	3.88	7.84	6.07	6.92	0.56	0.56
Blended Index <sup>4</sup>	2.18	6.34	4.06	8.35	5.58	—		
Morningstar Moderately Conservative Allocation Cat. Avg.	0.73	5.15	3.01	6.66	4.36	—		
Morningstar Moderate Allocation Cat. Avg.	-0.31	5.41	4.30	10.14	6.33	—		

Fund Inception: 7/31/06. Share Class Inception: I - 2/26/10; F - 2/28/17; R6 - 11/7/14. Performance prior to the inception of a class reflects performance and operating expenses of another class(es) (excluding sales charges, as applicable). If applicable fees and expenses were reflected, performance would have differed. Since inception performance is calculated from 7/31/06. Performance for periods of less than one year is not annualized.

Calendar Year Returns (%)	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011
Hartford Balanced Income Fund I	6.50	7.95	-8.85	10.15	7.72	19.35	-4.81	11.75	11.44	-0.19	7.92	12.19	13.07	8.83
Blended Index	8.26	10.30	-12.18	10.44	6.92	19.95	-5.03	9.84	12.02	-1.97	9.84	12.87	14.15	4.77
S&P 500 Index	25.02	26.29	-18.11	28.71	18.40	31.49	-4.38	21.83	11.96	1.38	13.69	32.39	16.00	2.11

**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](http://hartfordfunds.com).**

<sup>1</sup> Class I-Shares Star Ratings: 3-year 4 stars out of 426 products, 5-year 4 stars out of 390 products, and 10-year 5 stars out of 289 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](http://global.morningstar.com/managerdisclosures).

<sup>2</sup> Analyst-Driven %: 100. Data Coverage %: 100. The Morningstar Medalist Rating™ is the summary expression of Morningstar's forward-looking analysis using a rating scale of Gold, Silver, Bronze, Neutral, and Negative. The Medalist Ratings indicate which funds Morningstar believes are likely to outperform a relevant index or peer group average on a risk-adjusted basis over time. Funds are evaluated on three key pillars (People, Parent, and Process) which, when coupled with a fee assessment, forms the basis for the Medalist Rating they're assigned. Pillar ratings (Low, Below Average, Average, Above Average, and High) may be evaluated via an analyst's qualitative assessment (Analyst-Driven %) or using algorithmic techniques (Data Coverage %). Funds are sorted by their expected performance into rating groups defined by their Morningstar Category and their active or passive status. When analysts directly cover a fund, the rating is monitored and reevaluated at least every 14 months. When a fund is covered either indirectly by analysts or by algorithm, the rating is assigned monthly. For more detailed information, including their methodology, please go to [global.morningstar.com/managerdisclosures](http://global.morningstar.com/managerdisclosures). Morningstar Medalist Ratings are not statements of fact, nor are they credit or risk ratings. They (i) should not be used as the sole basis in evaluating a fund, (ii) involve unknown risks and uncertainties which may cause expectations not to occur or to differ significantly from what was expected, (iii) are not guaranteed to be based on complete or accurate assumptions or models when determined algorithmically, (iv) involve the risk that the return target will not be met due to such things as unforeseen changes in management, technology, economic development, interest rate development, operating and/or material costs, competitive pressure, supervisory law, exchange rate, tax rates, exchange rate changes, and/or changes in political and social conditions, and (v) should not be considered an offer or solicitation to buy or sell a fund. A change in the fundamental factors underlying the Morningstar Medalist Rating can mean that the rating is subsequently no longer accurate. ©2025 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.

<sup>3</sup> Expenses are the total annual operating expenses from the Fund's most recent prospectus at the time of publication.

<sup>4</sup> The Blended Index consists of 45% Russell 1000 Value Index, 44% Bloomberg US Corporate Index, 5.5% JP Morgan Emerging Markets Bond Index Plus, and 5.5% Bloomberg US High Yield 2% Issuer Cap Index.

**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. • The portfolio managers may allocate a portion of the Fund's assets to specialist portfolio managers, and among different asset classes, each of which may not work as intended. • Fixed income security risks include credit, liquidity, call, duration, event and interest-rate risk. As interest rates rise, bond prices generally fall. • For dividend-paying stocks, dividends are not guaranteed and may decrease without notice. • Value investing style may go in and out of favor, which may cause the Fund to underperform other funds that use different investing styles. • 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. • Restricted securities may be more difficult to sell and price than other securities. • Derivatives are generally more volatile and sensitive to changes in market or economic conditions than other securities; their risks include currency, leverage, liquidity, index, pricing, valuation, and counterparty risk.

**Investors should carefully consider a fund's investment objectives, risks, charges and expenses. This and other important information is contained in the fund's prospectus and summary prospectus, which can be obtained by visiting [hartfordfunds.com](http://hartfordfunds.com). Please read it carefully before investing.**

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