

MARCH 31, 2025

Hartford Schrodgers US MidCap Opportunities Fund



A: SMDVX **C:** HFDCX **F:** HFDFX **I:** SMDIX **R3:** HFDRX **R4:** HFDSX **R5:** HFDTX **SDR:** SMDRX **Y:** HFDYX

Objective Seeks capital appreciation.

Inception Date 3/31/06 **Morningstar Category** Mid-Cap Blend

Why Mid Caps?

Mid-cap companies are often in their growth phase with more established business models and management teams

Combining Distinct Company Types

Seeks three types of companies with distinct objectives: capital growth, lower downside volatility, and idiosyncratic growth

Sub-advised by Schrodgers

With 200+ years of experience, Schrodgers actively invests across public and private markets around the globe

Average Annual Total Returns (%)

Class	QTD	YTD	1 Year	3 Year	5 Year	10 Year	SI
R3	-4.85	-4.85	-0.07	4.02	14.55	7.87	8.55
R4	-4.78	-4.78	0.23	4.35	14.93	8.17	8.70
R5	-4.74	-4.74	0.51	4.64	15.22	8.41	8.83
SDR	-4.67	-4.67	0.67	4.75	15.36	8.54	8.90
Y	-4.74	-4.74	0.51	4.63	15.23	8.44	8.85
Benchmark	-3.40	-3.40	2.59	4.62	16.28	8.82	—
Morningstar Category	-4.55	-4.55	-0.13	4.46	16.02	7.99	—

Share Class Inception: R3, R4, R5, Y - 10/24/16; SDR - 12/30/14. Share class performance prior to 10/24/16 reflects the performance of the predecessor fund. Performance shown prior to the inception of a class reflects performance and operating expenses of another class(es). Had fees and expenses of a class been reflected for the periods prior to the inception of that class, performance would be different. Since inception (SI) performance is from 3/31/06. Performance and expenses for other share classes will vary. Additional information is in the prospectus. Performance for periods of less than one year is not annualized.

Benchmark: Russell MidCap Index measures the performance of the mid-cap segment of the US equity universe. Prior to 5/1/19, the Fund's primary benchmark was the Russell 2500 Index. Indices are unmanaged and not available for direct investment.

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.

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.

Portfolio managers from Schrodgers and years of experience

Robert Kaynor, CFA, 31 years
Joanna Wald, 24 years

Expenses (%)

	R3	R4	R5	SDR	Y
Gross	1.52	1.22	0.92	0.81	0.91
Net	1.52	1.22	0.92	0.81	0.91

Expenses are the total annual operating expenses from the Fund's most recent prospectus at the time of publication.

Calendar Year Returns (%) Y Shares

2024	15.37
2023	12.60
2022	-12.45
2021	25.88
2020	9.15
2019	28.05
2018	-10.87
2017	15.55
2016	18.37
2015	1.74

MARCH 31, 2025

Hartford Schrodgers US MidCap Opportunities Fund

HF

Sector Exposure (%)

	Fund	Benchmark	Underweight/Overweight
Cash	4	0	4
Industrials	21	19	2
Technology	14	12	2
Health Care	10	9	1
Utilities	7	6	1
Basic Materials	3	3	0
Financials	15	15	0
Telecommunications	1	1	0
Real Estate	7	8	-1
Consumer Discretionary	13	15	-2
Consumer Staples	3	5	-2
Energy	3	6	-3

Based on the Russell Global Sectors classification (RGS) system. May not total to 100% due to rounding.

Top Ten Holdings (%)

Aramark	2.62
Assurant, Inc.	2.51
Arthur J Gallagher & Co.	2.33
Rentokil Initial PLC	2.17
Amdocs Ltd.	2.10
Dolby Laboratories, Inc.	2.08
Verisk Analytics, Inc.	1.94
Waste Connections, Inc.	1.93
Match Group, Inc.	1.92
Reinsurance Group of America, Inc.	1.91

Percentage Of Portfolio **21.51**

Fund Characteristics

Net Assets	\$972 million
# of Holdings	65
% in Equities	96%
Beta (3 yrs)	0.82
R Squared (3 yrs)	0.96
Turnover	44%

Holdings Characteristics

	Fund	Benchmark
Price/Earnings	20.5x	18.7x
Price/Book	3.5x	2.8x
Return on Equity	13.2%	13.0%
Asset Weighted Market Cap (billions)	\$20.8	\$29.2
Median Market Cap (billions)	\$13.6	\$10.6

Market Cap Distribution (%)

Less than \$2 billion	0
\$2 billion - \$5 billion	3
\$5 billion - \$10 billion	33
Greater than \$10 billion	64
Not Classified	0

Benchmark Russell MidCap Index

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

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. • Mid-cap securities can have greater risks and volatility than large-cap securities. • 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. • Financially material environmental, social and/or governance (ESG) characteristics are one of several factors that may be considered. The Fund may perform differently from funds that do not integrate ESG into their analysis.

Beta measures the volatility of a portfolio relative to a benchmark. A beta of less than 1.00 indicates lower risk than the market; a beta of greater than 1.00 indicates higher risk than the market. **R Squared** represents the percentage of the portfolio's movement that can be explained by the market. **Turnover** is a measure of the Fund's trading activity which represents the portion of the Fund's holdings that has changed over a twelve-month period through the Fund's fiscal year end. Turnover shown excludes To-Be-Announced roll transactions, if any.

Price/Earnings is the ratio of a stock's current price divided by the trailing earnings per share for the past 12 months. **Price/Book** is the ratio of a stock's price to its book value per share.

Return on Equity is the average amount of net income returned as a percentage of shareholder's equity over the past five years. **Asset Weighted Market Cap** is the value of a corporation as determined by the number of outstanding shares of common stock multiplied by the price per share.

Mutual funds are distributed by Hartford Funds Distributors, LLC (HFD), Member FINRA. Advisory services are provided by Hartford Funds Management Company, LLC (HFMC). Certain funds are sub-advised by Schroder Investment Management North America Inc (SIMNA). Schroder Investment Management North America Ltd. (SIMNA Ltd) serves as a secondary sub-adviser to certain funds. HFMC, SIMNA, and SIMNA Ltd. are all SEC registered investment advisers. Hartford Funds refers to HFD and HFMC, which are not affiliated with any sub-adviser.

INSFS_SUSMO_0425 4367527