

Seeks capital appreciation.

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

**Inception Date** 03/31/2006

**Morningstar® Category** Mid-Cap Blend

**Lipper Peer Group** Mid-Cap Core

**Overall Morningstar Rating™ (I-Share)\***



397 Products | Mid-Cap Blend Category Based on Risk-Adjusted Returns as of 6/30/24

### Performance (%)

Class	QTD	YTD	Average Annual Total Returns					SI
			1 Year	3 Year	5 Year	10 Year		
A	-3.91	4.97	10.01	4.07	8.82	8.67	8.68	
A with 5.5% Max Sales Charge	—	—	3.94	2.13	7.60	8.06	8.34	
F	-3.82	5.16	10.40	4.45	9.22	9.03	9.00	
I	-3.82	5.10	10.25	4.35	9.11	8.96	8.96	
Y	-3.87	5.11	10.24	4.33	9.10	8.96	8.96	
Russell MidCap Index	-3.35	4.96	12.88	2.37	9.46	9.04	—	
Morningstar Category	-3.32	5.57	13.23	3.41	9.43	8.19	—	
Lipper Peer Group	-3.97	4.77	12.50	4.20	9.31	7.82	—	

Share Class Inception: A, I - 3/31/06; F - 2/28/17; Y - 10/24/16. 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) (excluding sales charges, as applicable). 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. Only Class A assesses a sales charge.

**Russell MidCap Index** measures the performance of the mid-cap segment of the U.S. 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.

### Portfolio Managers from Schroders

**Robert Kaynor, CFA**

Portfolio Manager  
Professional Experience Since 1994

**Joanna Wald**

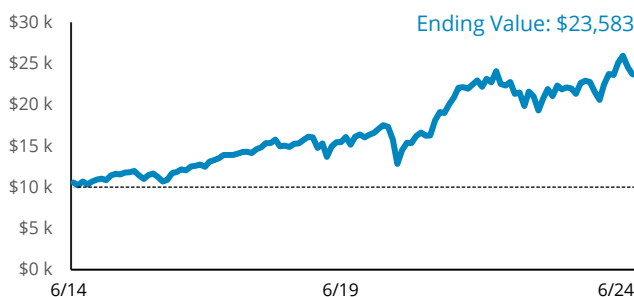
Portfolio Manager  
Professional Experience Since 2001

The portfolio managers are supported by the full resources of Schroders.

### Expenses (%)<sup>1</sup>

	A	F	I	Y
Gross	1.18	0.82	0.91	0.93
Net	1.18	0.82	0.91	0.93

### Value of a \$10,000 Investment (Class I)



### Calendar Year Returns (%)

2023	12.68
2022	-12.46
2021	25.96
2020	9.17
2019	28.05
2018	-11.00
2017	15.56
2016	18.36
2015	1.74
2014	11.02

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).

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](http://hartfordfunds.com). Please read it carefully before investing.

Effective 5/1/19, the Fund changed its principal investment strategy and benchmark. Returns prior to 5/1/19 reflect the performance of the Fund's prior strategy.

<sup>1</sup> Expenses as shown in the Fund's most recent prospectus.

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.

JUNE 30, 2024

# Hartford Schroders US MidCap Opportunities Fund

## Sector Exposure (%)

	Fund 6/30/24	Benchmark 6/30/24	Underweight/Overweight 6/30/24
Cash	4	0	4
Consumer Discretionary	18	15	3
Technology	15	13	2
Telecommunications	3	1	2
Consumer Staples	3	3	0
Health Care	9	9	0
Energy	4	5	-1
Industrials	21	22	-1
Utilities	5	6	-1
Real Estate	6	8	-2
Basic Materials	1	4	-3
Financials	12	15	-3

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

## Top Ten Holdings (%)

as of 3/31/24	
Aramark	2.53
Assurant, Inc.	2.08
AptarGroup, Inc.	2.06
Hexcel Corp.	2.02
Rentokil Initial PLC	2.01
Masimo Corp.	1.92
Catalent, Inc.	1.82
Waste Connections, Inc.	1.77
Regal Rexnord Corp.	1.74
PTC, Inc.	1.67
<b>Percentage Of Portfolio</b>	<b>19.62</b>

## Top Ten Holdings (%)

as of 6/30/24	
Aramark	3.01
Rentokil Initial PLC	2.64
AptarGroup, Inc.	2.13
Assurant, Inc.	2.03
Hexcel Corp.	1.96
Churchill Downs, Inc.	1.80
Masimo Corp.	1.74
Waste Connections, Inc.	1.73
BWX Technologies, Inc.	1.72
Chemed Corp.	1.71
<b>Percentage Of Portfolio</b>	<b>20.47</b>

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 and as a result, the investment process may not work as intended.

**Price/Book** is the ratio of a stock's price to its book value per share. **Price/Earnings** is the ratio of a stock's current price divided by the trailing earnings per share for the past 12 months. **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. **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. **Standard Deviation** measures the portfolio's total-return volatility. A higher standard deviation indicates greater historical volatility. **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.

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Net Assets	\$944 million
# of Holdings	67
% in Equities	96%
Beta (3 yrs)	0.83
R Squared (3 yrs)	0.96
Standard Deviation (3 yrs)	16.60%
Turnover	34%

## Holdings Characteristics

	Fund	Benchmark
Price/Earnings	22.4x	19.1x
Price/Book	4.3x	2.8x
Return on Equity	15.2%	13.4%
Asset Weighted Market Cap (billions)	\$20.0	\$27.7
Median Market Cap (billions)	\$17.6	\$10.5

## Market Cap Distribution (%)

Less than \$2 billion	0
\$2 billion - \$5 billion	0
\$5 billion - \$10 billion	32
Greater than \$10 billion	68
Not Classified	0

**Benchmark** Russell MidCap Index

\*Class I-Shares Star Ratings: 3-year 4 stars out of 397 products, 5-year 4 stars out of 364 products, and 10-year 4 stars out of 251 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). ©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.