

**Fund Symbols:** I: HBLIX A: HBLAX C: HBLCX F: HBLFX R3: HBLRX R4: HBLSX R5: HBLTX R6: HBLVX Y: HBLVX

## Designed for Results

The Hartford Balanced Income Fund is a simple strategy designed to offer the growth potential investors need without taking excessive risk.

### Invests in a Mix of Stocks and Bonds

The Fund targets a balanced allocation of 45% stocks and 55% bonds, with fluctuations of no more than +/- 5%. The stocks can provide growth potential, while the bonds can provide income and help reduce volatility.

### Companies You Know and Trust

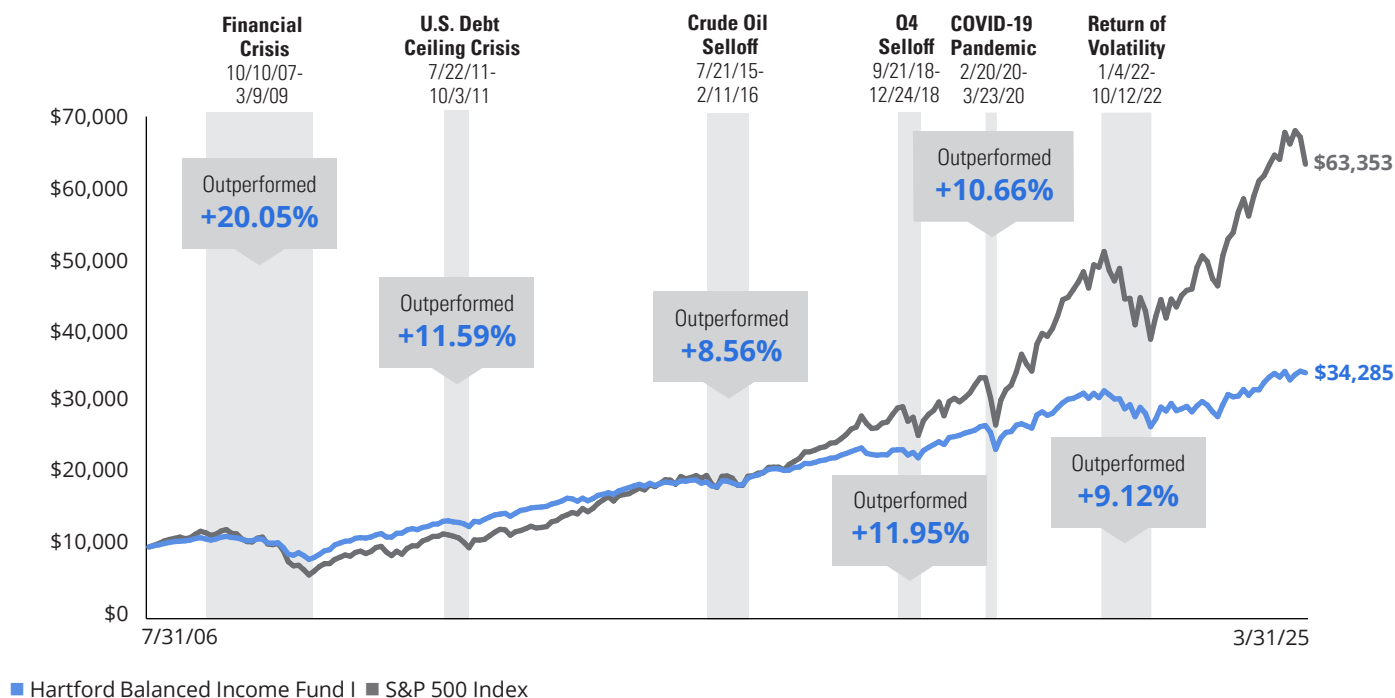
Dividend-paying stocks and investment-grade bonds provide investments that you can feel confident investing in for the long run. A small allocation to high-yield and emerging-market bonds can help enhance returns and income.

### Strong Performance With Lower Volatility

The Fund has generated strong long-term performance, providing investors with significantly better returns during the market's most notable periods of volatility.

## Historically Attractive Returns During Periods of Market Volatility

Growth of \$10,000 (From Inception: 7/31/06-3/31/25)



Source: Morningstar, 4/25.

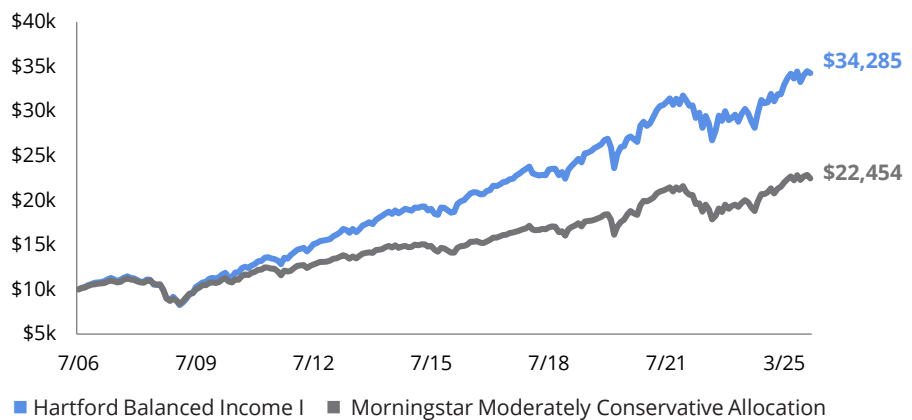
**Past performance does not guarantee future results.** The S&P 500 Index, which represents US stocks, is a market capitalization-weighted price index composed of 500 widely held common stocks. Indices are unmanaged and not available for direct investment.

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

426 Products | Moderately Conservative  
Allocation Category Based on Risk-Adjusted  
Returns as of 3/31/25

**Portfolio Managers from Wellington  
Management and years of experience**

Scott I. St. John, CFA, 31 years  
Matthew Hand, CFA, 28 years  
Adam H. Illfelder, CFA, 28 years

**Growth of a \$10,000 Investment (Class I) (7/31/06-3/31/25)****Top Ten Equity Holdings (%)**

UnitedHealth Group, Inc.	1.54
ConocoPhillips	1.32
Bank of America Corp.	1.28
Johnson & Johnson	1.25
JP Morgan Chase & Co.	1.23
American International Group, Inc.	0.91
Merck & Co., Inc.	0.89
Gaming & Leisure Properties, Inc.	0.82
Pfizer, Inc.	0.82
Elevance Health, Inc.	0.81
<b>Percentage Of Portfolio</b>	<b>10.87</b>

**Top Ten Fixed-Income Issuers (%)**

U.S. Treasury Notes	2.21
JP Morgan Chase & Co.	1.31
U.S. Treasury Bonds	1.05
Goldman Sachs Group, Inc.	0.87
Oracle Corp.	0.84
HSBC Holdings PLC	0.80
Bank of America Corp.	0.78
Morgan Stanley	0.72
Wells Fargo & Co.	0.67
Pacific Gas & Electric Co.	0.62
<b>Percentage Of Portfolio</b>	<b>9.87</b>

<b>Average Annual Total Returns (%) as of 3/31/25</b>	<b>YTD</b>	<b>1 Year</b>	<b>3 Year</b>	<b>5 Year</b>	<b>10 Year</b>	<b>Since Inception</b>
Hartford Balanced Income Fund I	3.01	7.30	3.81	7.75	5.99	6.76
Blended Index <sup>1</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	—

**Expenses<sup>2</sup>** Net: 0.65% Gross: 0.65%

Fund Inception: 7/31/06. Share Class Inception: 2/26/10. Class I-share performance prior to its inception date reflects Class A-share performance (excluding sales charges) and operating expenses. Since inception performance is from 7/31/06. Performance for periods of less than one year is not annualized.

**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>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.

<sup>2</sup>Expenses are the total annual operating expenses from the Fund's most recent prospectus at the time of publication.

\*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). ©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.

**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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