

# Eventide Core Bond Fund

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Q3 2022 Presentation

**Founded:** 2008

**Headquarters:** Boston, MA

**Vision:**

**To serve individuals, financial advisors, and institutions by offering high performance investments that create compelling value for the global common good.**

**Funds:**

- Eventide Gilead Fund
- Eventide Healthcare & Life Sciences Fund
- Eventide Exponential Technologies Fund
- Eventide Large Cap Focus Fund
- Eventide Multi-Asset Income Fund
- Eventide Dividend Opportunities Fund
- Eventide Core Bond Fund
- Eventide Limited-Term Bond Fund

**AUM:**

**\$6.09B in net assets under management**

There is no guarantee that the Adviser will meet its objectives. Total net assets as of 09/30/2022.

# Eventide Core Bond Fund

## Fund Objective

**Seeks total return consistent with income generation**

A: ETARX | C: ETCRX | I: ETIRX | N: ETNRX

## About the Fund

**The fund seeks to invest at least 80% net assets in bonds.**

## Benchmark

**Bloomberg U.S. Aggregate Bond Index**

## Morningstar Category

**US Fund Intermediate Core Bond**

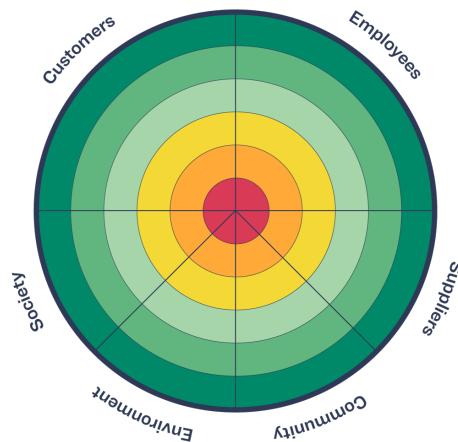
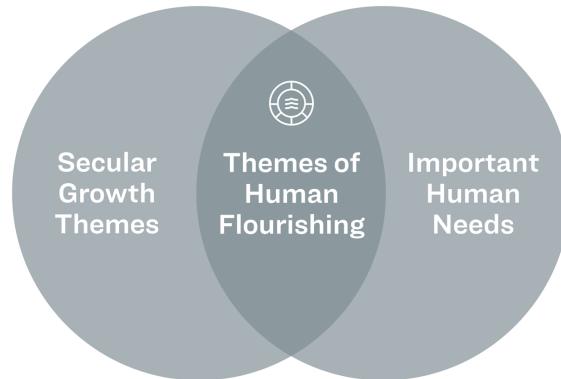
## Total Net Assets

**\$61MM (Inception date: July 31, 2020)**

Total assets as of 09/30/2022. The Bloomberg U.S. Aggregate Bond Index is a market capitalization-weighted index, meaning the securities in the index are weighted according to the market size of each bond type. Most U.S.-traded investment grade bonds are represented. Municipal bonds and Treasury Inflation-Protected Securities are excluded. The index includes Treasury securities, Government agency bonds, mortgage-backed bonds, corporate bonds, and a small amount of foreign bonds traded in the U.S. There is no guarantee that the Adviser's approach will produce the desired results. All investments involve risk, including the possible loss of principal.

# Eventide Distinctives

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## Themes of Human Flourishing

**Seeking to invest in companies best positioned to participate in long-term secular investment themes that serve important human needs.**

## Creating Compelling Value for Society and the Global Common Good

**Focused on identifying and investing in companies capable of increasing profitability and growth by serving well the needs of customers, employees, suppliers, communities, the environment, and society.**

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# Fund Distinctives

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## Benchmark Driven Duration

**Seeks to stay within +/-25% of the fund's benchmark, the Bloomberg U.S. Aggregate Bond Index**

## Income Focused

**Seeks to build a portfolio that has a yield advantage over its benchmark.**

## Total Return Potential

**Seeks bonds of varying durations to maintain potential for greater total return.**

The Bloomberg U.S. Aggregate Bond Index is a broad-based benchmark that measures the investment grade, U.S. dollar-denominated, fixed-rate taxable bond market. This includes Treasuries, government-related and corporate securities, mortgage-backed securities, asset-backed securities and collateralized mortgage-backed securities.. The portfolio manager's views may prove to be incorrect. There is no guarantee that the Adviser's approach will produce the desired results. All investments involve risks, including the possible loss of principal.

# Portfolio Management



## Dolores Bamford, CFA

Co-CIO, Senior Portfolio Manager

Dolores Bamford, CFA serves as co-CIO for Eventide, and as Senior Portfolio Manager on the Eventide Multi-Asset Income Fund, the Eventide Dividend Opportunities Fund, the Eventide Limited-Term Bond Fund and the Eventide Core Bond Fund.

### *Experience and Education*

- Managing Director and Portfolio Manager at Goldman Sachs
- Senior Vice President and Portfolio Manager at Putnam Investments
- Investment Researcher at Fidelity Investments
- SM in Management from MIT Sloan School of Management
- BA in Economics from Wellesley College



## David M. Dirk, CFA

Portfolio Manager

David M. Dirk, CFA, serves as portfolio manager for assets allocated to the Fund's Fixed Income Sub-Adviser, Boyd Watterson Asset Management, LLC.

### *Experience and Education*

- Director of Portfolio Management and Trading at Boyd Watterson.
- MBA from Case Western Reserve University
- BA from Baldwin-Wallace University

For informational purposes only. As of 09/30/2022.

# Investment Team



**Finny Kuruvilla,  
MD, PhD**  
Co-CIO, Senior  
Portfolio  
Manager



**Dolores  
Bamford, CFA**  
Co-CIO, Senior  
Portfolio  
Manager



**Anant Goel**  
Portfolio  
Manager, Senior  
Research  
Analyst



**Andrew Singer,  
CFA**  
Portfolio  
Manager, Senior  
Research  
Analyst



**Kyle Rasbach,  
MD, PhD**  
Managing  
Director, Senior  
Research  
Analyst



**Jordan  
Baumhardt, PhD**  
Research  
Analyst,  
Associate



**Westley Dupray**  
Research  
Analyst,  
Associate



**Faina Rozental**  
Research  
Analyst



**Christian Say**  
Research  
Analyst



**Reggie Smith**  
Research  
Analyst



**Drew Bard**  
Research  
Analyst



**Nathan  
Akhavan**  
Associate  
Research  
Analyst,  
Associate



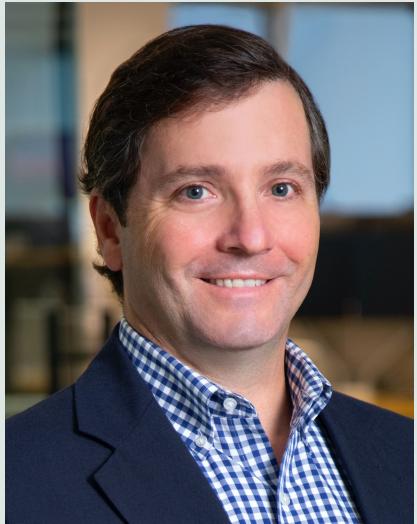
**Nicholas  
Leibold, CFA**  
Associate  
Research  
Analyst



**Elisabeth  
Armstrong**  
Director of  
Healthcare  
Initiatives

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# Trading Team



**Colin Delaney**

Head of Trading, Portfolio  
Specialist



**Conor Kelly**

Trading Specialist

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# Business 360® Research Team

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**Tyler Frugia**  
Director of  
Business 360



**Brock Treworgy**  
Business 360  
Research  
Manager



**Dashell Laryea**  
Business 360  
Research  
Analyst



**Ruben Walter**  
Business 360  
Research  
Analyst



**Fred Ge**  
Senior Portfolio  
Consultant

For informational purposes only. As of 09/30/2022.

# Investment Philosophy

We believe **high-quality companies** that excel at **creating value for others** and **trade at a discount to intrinsic value** offer superior long-term risk-adjusted returns.

The Adviser's judgment about the quality and intrinsic value of particular companies may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

# Investment Process

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**Boyd Watterson is the subadvisor for the Fund and follows an approach which:**

- Combines the Eventide Business 360® framework with fixed income expertise.
- The Business 360® framework looks for green, social, and sustainable<sup>1</sup> businesses or government entities.
- Together the subadvisor and Eventide form an investable universe of fixed income securities.
- The subadvisor performs the credit analysis, the sourcing and the everyday bond management activities in the portfolio.
- The subadvisor applies its “alpha drivers” to fixed income management, namely sector allocation, duration management, yield curve positioning and securities selection.

The Adviser's judgment about industries, secular themes, and particular companies may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

1. Green bonds allow issuers to use proceeds for environmental projects; social bonds allow issuers to use proceeds for social projects; sustainable bonds are a combination of green and social bonds

# Alpha Drivers

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## Sector Allocation

**Explaining fundamentals, historical spread and cross-sector spread relationships, and supply and demand.**

## Duration Management

**Applying fundamental and technical analysis to manage interest rate exposures relative to short- and long-term expectations.**

## Yield Curve Positioning

**Examining monetary policy, inflation expectations, and supply and demand relative to expectations for curve reshaping.**

## Security Selection

**Applying a top-down, bottom-up approach that blends quantitative screening and fundamental credit research to achieve optimal risk/reward characteristics.**

There is no guarantee that the Adviser's Investment Process will produce the desired results. All investments involve risks, including possible loss of capital.

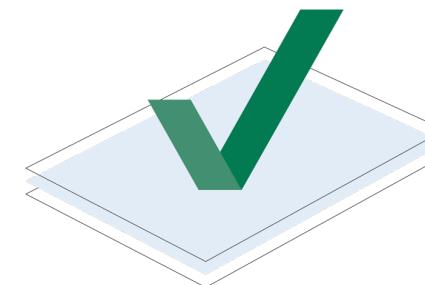
# Values-Based Analysis

There are three dimensions to our approach to values-based investing:



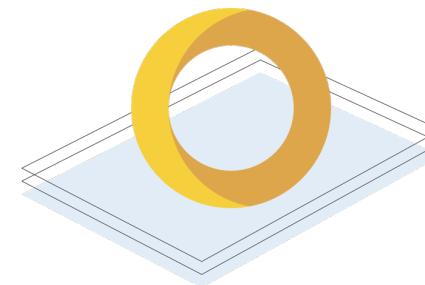
## AVOID

Create an investable universe of securities that pass our screens, grounded in our values.



## EMBRACE

Conduct original Business 360® research to find the highest quality opportunities that contribute to human flourishing through value creation for society and other key stakeholders.



## ENGAGE

Engage portfolio companies and security issuers on Business 360® issues to advocate for positive change.

The Strategy's ethical values screening criteria could cause it to underperform similar strategies that do not have such screening criteria. This could be due to ethically acceptable companies falling out of favor with investors or failing to perform as well as companies that do not meet the Strategy's ethical screening guidelines. Reference to Eventide's Business 360 approach is provided for illustrative purposes only and indicates a general framework of guiding principles that inform Eventide's overall research process. The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

# Our Research Framework: Business 360<sup>®</sup>

Our **proprietary framework** for evaluating both a company's **long-term competitive advantage** and its impact on **human flourishing** by analyzing its **operations and strategy** through the lens of **key stakeholders**.

Reference to Eventide's Business 360<sup>®</sup> approach is provided for illustrative purposes only and indicates a general framework of guiding principles that inform Eventide's overall research process. The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

# We believe what's right...

**Companies that place a premium on:**

- Customer satisfaction
- Employee morale
- Supplier partnership
- Societal impact
- Environmental stewardship



**...is also smart.**

**Tend to have:**

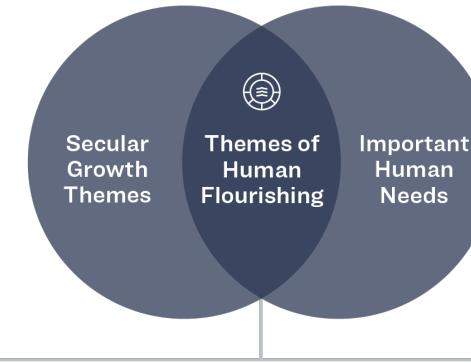
- Higher customer loyalty
- Higher productivity
- Resilient supply chains
- Stronger brands
- Sustainable productive yield

Reference to Eventide's Business 360° approach is provided for illustrative purposes only and indicates a general framework of guiding principles that inform Eventide's overall research process. The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses. The term "smart" is used for informational purposes only, and does not imply a certain level of skill or training.

# Investment Themes

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Seeking to invest in companies positioned at the nexus of long-term secular growth themes and important human needs.

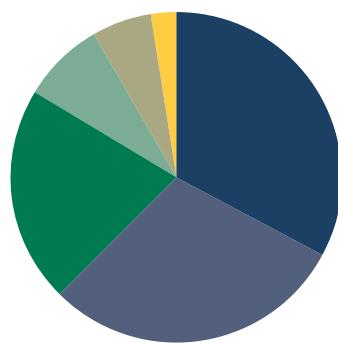


These are representative examples of themes in the Eventide Strategies. The Adviser's judgment about secular themes may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

# Composition

A: ETARX | C: ETCRX | I: ETIRX | N: ETNRX

## Portfolio Breakdown<sup>1</sup> (%)

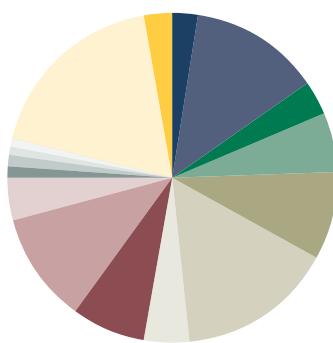


Average Effective Duration<sup>3</sup>: 6.13 years

Number of holdings: 78

## 30 Sep 2022

## Debt Ratings Allocation<sup>1, 4</sup> (%)



## 30 Sep 2022

1. Allocation percentages are subject to change at any time, and should not be considered investment advice.
2. Includes cash, cash equivalents, money market funds, impact bonds and options. Impact bonds fund business models that strive to have significant social or environmental effects.
3. Average effective duration provides a measure of a fund's interest-rate sensitivity. The longer a fund's duration, the more sensitive the fund is to shifts in interest rates.
4. The ratings allocation reflects the Standard & Poor's equivalent ratings category for the higher credit quality rating assigned by either Standard & Poor's, Moody's, or DBRS. Credit quality does not remove market risk. Ratings apply to the credit worthiness of the issuers of the underlying securities and not the Fund or its shares. Ratings are subject to change.
5. Includes U.S. Government Agencies and U.S. Government Sponsored Entities, along with other bonds.

# Returns, Distributions & Yield

A: ETARX | C: ETCRX | I: ETIRX | N: ETNRX

## Trailing Returns<sup>1</sup> (%)

	YTD	3-mos	1-year	3-year	5-year <sup>2</sup>	10-year <sup>2</sup>	Since Inception <sup>2</sup>	30 Sep 2022
Eventide Core Bond Fund								
Class I	-14.75	-4.19	-15.07	—	—	—	-8.30	07/31/2020
Class A without load	-15.04	-4.24	-15.44	—	—	—	-8.53	07/31/2020
Class A with 5.75% load <sup>3</sup>	-19.96	-9.70	-20.31	—	—	—	-11.00	07/31/2020
Class C <sup>4</sup>	-15.40	-4.46	-15.93	—	—	—	-9.16	07/31/2020
Class N	-14.98	-4.26	-15.34	—	—	—	-8.48	07/31/2020
Benchmark								
Bloomberg U.S. Aggregate Bond Index <sup>5</sup>	-14.61	-4.75	-14.60	—	—	—	-7.78	07/31/2020

## Distributions and Yield<sup>1</sup>

	Class I	Class A	Class C	Class N	SEC 30-Day Yield <sup>6</sup>	Class I	Class A	Class C	Class N	30 Sep 2022
Sep 2021 – Sep 2022	\$0.15	\$0.13	\$0.08	\$0.13	Subsidized (Waiver)	3.59%	3.14%	2.56%	3.38%	
Distributions <sup>6</sup>	1.89%	1.56%	0.98%	1.65%	Unsubsidized (No Waiver)	3.23%	2.80%	2.19%	3.02%	

Eventide Core Bond Fund expenses: Class I, Gross Expenses 0.69%, Net Expenses 0.58%; Class A, Gross Expenses 0.94%, Net Expenses 0.83%; Class C, Gross Expenses 1.69%, Net Expenses 1.58%; Class N, Gross Expenses 0.89%, Net Expenses 0.78%. The adviser has contractually agreed to waive fees and/or reimburse expenses of the Fund through 10/31/2022. The agreement may only be terminated by the Fund's Board of Trustees on 60 days' written notice.

**Performance is historical and does not guarantee future results. Investment return and principal value will fluctuate with changing market conditions so that when redeemed, shares may be worth more or less than their original cost. Current performance may be lower or higher than the data quoted. Investors cannot directly invest in an index, and unmanaged index returns do not reflect any fees, expenses, or sales charges. The volatility of an index may be materially different than that of the Fund, and investors should not expect the Fund to achieve the same results as a listed index. This material must be read along with the Fund's prospectus, which may be obtained at [eventidefunds.com/prospectus](http://eventidefunds.com/prospectus). Performance data current to the most recent month-end may be obtained by calling 1-877-771-EVEN (3836).**

1. The returns shown do not reflect the deduction of taxes that a shareholder would pay on fund distributions or on the redemption of fund shares. Because of ongoing market volatility, fund performance may be subject to substantial short-term changes.

2. Performance figures for periods greater than 1 year are annualized. Annualized since inception figures use an inception date of 07/31/2020.

3. In the case of investments at or above the \$1 million breakpoint (where you do not pay an initial sales charge), a 1.00% contingent deferred sales charge ("CDSC") may be assessed on shares redeemed within eighteen months of purchase. The CDSC for these Class A shares is based on the NAV at the time of purchase. The holding period for the CDSC begins on the day you buy your shares. Some intermediaries may waive or discount the CDSC under certain circumstances.

4. A 1.00% contingent deferred sales charge ("CDSC") may be assessed on C-shares redeemed within twelve months of purchase.

5. The Bloomberg U.S. Aggregate Bond Index is a broad based benchmark that measures the investment grade, U.S. dollar-denominated, fixed-rate taxable bond market. This includes Treasuries, government-related and corporate securities, mortgage backed securities, asset-backed securities and collateralized mortgage-backed securities.

6. Represents the sum of all distributions from the period indicated. Distributions consist of dividend and interest income, capital gains, and/or return of capital. Shareholders should not assume that Fund distributions represent net profit. Income may be distributed regardless of whether such income will be treated as return of capital.

7. 12-Month Yield is the sum of a fund's total trailing 12-month interest and dividend payments divided by the last month's ending share price (NAV) plus any capital gains distributed over the same period.

8. SEC Yield is based on a 30-day (or one-month) period ending 09/30/2022 and is calculated by dividing the net investment income per share earned during the period by the maximum offering price per share on the last day of the period. For more information see SEC Form N-1A, p. 56.

# Quarterly Returns

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A: ETARX | C: ETCRX | I: ETIRX | N: ETNRX

## Quarterly Returns<sup>1</sup> (%)

	Q4 2020–Q3 2022							
	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022
Eventide Core Bond Fund I	1.38	-3.68	1.80	-0.18	-0.38	-6.18	-5.15	-4.19
Bloomberg U.S. Aggregate Bond Index <sup>2</sup>	0.67	-3.37	1.83	0.05	0.01	-5.93	-4.69	-4.75

1. Compares the Eventide Core Bond Fund Class I's performance to index performance over the periods shown. Performance will differ for other fund classes, based upon fees and commissions. The returns shown do not reflect the deduction of taxes that a shareholder would pay on fund distributions or on the redemption of fund shares. Because of ongoing market volatility, fund performance may be subject to substantial short-term changes.

2. The Bloomberg U.S. Aggregate Bond Index is a broad based benchmark that measures the investment grade, U.S. dollar-denominated, fixed-rate taxable bond market. This includes Treasuries, government-related and corporate securities, mortgage backed securities, asset-backed securities and collateralized mortgage-backed securities.

Eventide Core Bond Fund expenses: Class I, Gross Expenses 0.69%, Net Expenses 0.58%; Class A, Gross Expenses 0.94%, Net Expenses 0.83%; Class C, Gross Expenses 1.69%, Net Expenses 1.58%; Class N, Gross Expenses 0.89%, Net Expenses 0.78%. The adviser has contractually agreed to waive fees and/or reimburse expenses of the Fund through 10/31/2022. The agreement may only be terminated by the Fund's Board of Trustees on 60 days' written notice.

**Performance is historical and does not guarantee future results. Investment return and principal value will fluctuate with changing market conditions so that when redeemed, shares may be worth more or less than their original cost. Current performance may be lower or higher than the data quoted. Investors cannot directly invest in an index, and unmanaged index returns do not reflect any fees, expenses, or sales charges. The volatility of an index may be materially different than that of the Fund, and investors should not expect the Fund to achieve the same results as a listed index. Performance data current to the most recent month-end may be obtained by calling 1-877-771-EVEN (3836).**

# Market Risk

A: ETARX | C: ETCRX | I: ETIRX | N: ETNRX

## Market Risk<sup>1</sup>

	30 Sep 2022				
	Std. Dev. 3-year	Beta Inception <sup>2</sup>	Alpha (%) 3-year	R-Squared (%) 3-year	Inception <sup>2</sup>
Eventide Core Bond I	— 5.42	— 0.98	— -0.71	— 97.39	
Bloomberg U.S. Aggregate Bond Index <sup>3</sup>	— 5.44	— 1.00	— —	— 100.00	

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2. Annualized since inception figures use an inception date of 08/01/2020 and not the actual inception date of 07/31/2020 as only full month data is used in Market Risk calculations.

3. The Bloomberg U.S. Aggregate Bond Index is a broad based benchmark that measures the investment grade, U.S. dollar-denominated, fixed-rate taxable bond market. This includes Treasuries, government-related and corporate securities, mortgage backed securities, asset-backed securities and collateralized mortgage-backed securities.

# Morningstar Ratings

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TM



**US Fund Intermediate Core Bond  
(2886 funds)**  
as of July 31, 2022

**Past performance is no guarantee of future results.** The Morningstar Sustainability Rating and the Morningstar Portfolio Sustainability Score are not based on fund performance and are not equivalent to the Morningstar Rating ('Star Rating'). The Morningstar Sustainability Rating™ is intended to measure how well the issuing companies of the securities within a fund's portfolio are managing their environmental, social, and governance ("ESG") risks and opportunities relative to the fund's Morningstar category peers. The Morningstar Sustainability Rating calculation is a two-step process. First, each fund with at least 50% of assets covered by a company-level ESG score from Sustainalytics receives a Morningstar Portfolio Sustainability Score™. The Morningstar Portfolio Sustainability Score is an asset-weighted average of normalized company-level ESG scores with deductions made for controversial incidents by the issuing companies, such as environmental accidents,

fraud, or discriminatory behavior. The Morningstar Sustainability Rating is then assigned to all scored funds within Morningstar Categories in which at least ten (10) funds receive a Portfolio Sustainability Score and is determined by each fund's rank within the following distribution: High (highest 10%), Above Average (next 22.5%), Average (next 35%), Below Average (next 22.5%), and Low (lowest 10%). The Morningstar Sustainability Rating is depicted by globe icons where High equals 5 globes and Low equals 1 globe. A Sustainability Rating is assigned to any fund that has more than half of its underlying assets rated by Sustainalytics and is within a Morningstar Category with at least 10 scored funds; therefore, the rating is not limited to funds with explicit sustainable or responsible investment mandates. Morningstar updates its Sustainability Ratings monthly. Portfolios receive a Morningstar Portfolio Sustainability Score and Sustainability Rating one month and six business days after their reported as-of date based on the most recent portfolio. As part of the evaluation process, Morningstar uses Sustainalytics' ESG scores from the same month as the portfolio as-of date. The Morningstar Portfolio Sustainability Scores and Morningstar Sustainability Ratings are new and it is anticipated that Morningstar will issue the scores and ratings monthly. The Fund's portfolio is actively managed and is subject to change, which may result in a different Morningstar Sustainability Score and Rating. % Rank in Category is the fund's percentile rank for the specified time period relative to all funds that have the same Morningstar category. The highest (or most favorable) percentile rank is 1 and the lowest (or least favorable) percentile rank is 100. The top-performing fund in a category will always receive a rank of 1. Percentile ranks within categories are most useful in those categories that have a large number of funds.

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# Morningstar Rankings

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**Top 58% 1yr returns (445 funds)**  
Percentile Ranking, US Fund  
Intermediate Core Bond  
for September 30, 2022, based on total return

*Morningstar percentile rankings pertain to the I share class only. Rankings are subject to change and may differ for other share classes based on fees and sales charges. Morningstar percentile ranking is an investment's total return percentile rank against others in its Morningstar Category, ranging from 1 (best) to 100 (worst). The ranking does not account for sales loads, where applicable. Past performance is no guarantee of future results.*

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# Important Information

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**Mutual Funds involve risk including the possible loss of principal. Past performance does not guarantee future results.**

The Fund's ethical values screening criteria could cause it to under-perform similar funds that do not have such screening criteria. Investors in the Fund should be aware that interest rates may change at any time based on government policy. In general, the price of a fixed income security falls when interest rates rise. Longer term securities may be more sensitive to changes in interest rates. A rise in interest rates may result in volatility and increased redemptions, which in turn could result in the Fund being forced to liquidate portfolio securities at disadvantageous prices. Interest rates are sensitive to changes in inflation, and investing in bonds exposes investors to inflation risk. Bonds may be subject to default, causing loss of invested capital. Fixed income investments may be of any maturity or credit quality, but the Fund's weighted average effective portfolio duration will be between three years and nine years. The Fund may invest, directly or indirectly, in "junk bonds." Such securities are speculative investments that carry greater risks than higher quality debt securities. The Fund can invest in smaller-sized companies which may experience higher failure rates than larger companies and normally have a lower trading volume than larger companies. There are unique risks associated with asset backed securities, convertible securities, credit, duration, extension, foreign securities, income, LIBOR, mortgage back securities, municipal bonds, preferred stocks, pre-payment, securities, sovereign debt, and U.S. Agency securities that are covered in the Fund's prospectus and SAI. The Fund has no history of operations prior to its inception date.

This information is for use with concurrent or prior delivery of a fund prospectus, which can be obtained at <https://www.eventidefunds.com/prospectus> or by calling 1-877-771-EVEN (3836). Investors should consider a fund's investment objectives, risks, charges and expenses carefully before investing or sending money. Eventide Mutual Funds are distributed by Northern Lights Distributors, LLC, Member FINRA/SIPC, which is not affiliated with Eventide Asset Management, LLC.

# Appendix

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# Sales Team

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**Mark Wambolt**  
Director of Sales



**Mike Schnackenberg**  
Director of  
Intermediary  
Distribution,  
New England  
Region



**Jeff Cave, CIMA®**  
Director of  
Institutional  
Markets,  
Northeast  
Region



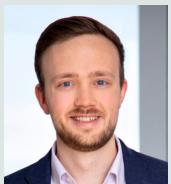
**Lans Slack**  
Senior Regional  
Director, Mid-  
Atlantic Region



**Abel Ballew**  
Regional  
Director,  
Heartland  
Region



**Greg Gunter**  
Regional  
Director,  
Southeast  
Region



**Joseph Reedy**  
Regional  
Director, Great  
Lakes Region



**Jacob Seif, CIMA®, CFP®**  
Regional  
Director, South  
Region



**Carly Shotmeyer**  
Regional  
Director, South  
Florida Region



**Colby Smidt**  
Regional  
Director,  
Mountain States  
Region



**Don Williams**  
Regional  
Director,  
California and  
Hawaii



**Deirdre Gibson, CIMA®**  
Partnership  
Success  
Specialist

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# Investment Consulting Group

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**Chris Grogan,  
CFA**  
Director of  
Investment  
Consulting



**Fred Ge, CFA**  
Senior Portfolio  
Consultant



**Robert Carney**  
Portfolio  
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