

# Eventide Core Bond Fund

Q4 2023 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 Balanced Fund
- Eventide Dividend Opportunities Fund
- Eventide Core Bond Fund
- Eventide Limited-Term Bond Fund

**AUM:**

**\$6.91B in net assets under management**

There is no guarantee that the Adviser will meet its objectives. Total net assets as of 12/31/2023.

# Eventide Core Bond Fund

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## 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

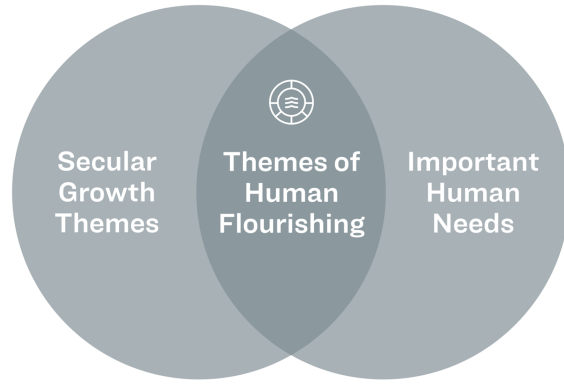
**US Fund Intermediate Core Bond**

## Total Net Assets

**\$114MM (Inception date: July 31, 2020)**

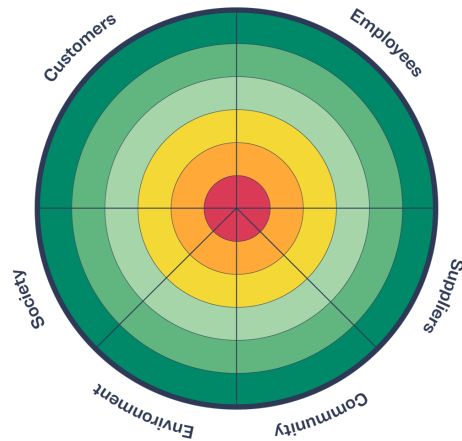
Total assets as of 12/31/2023. The Bloomberg U.S. Aggregate Bond Index is a market capitalization-weighted index, meaning the securities in the index are weighted according to the market size of each bond type. Most U.S.-traded investment grade bonds are represented. Municipal bonds and Treasury Inflation-Protected 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



## Themes of Human Flourishing

**Seeking to invest in companies 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.**

For informational purposes only. There is no guarantee that the Adviser's approach will produce the desired results. All investments involve risks, including the possible loss of principal. We refer to long-term secular investment themes as those that tend to be persistent through market conditions.

# 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



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

Mr. Grogan serves as Director of Investment Consulting for Eventide and Portfolio Manager for the Eventide Limited-Term Bond Fund and the Eventide Core Bond Fund.

*Experience and Education*

- Over 10 years of investment experience.
- Associate Portfolio Manager with Boston Advisors, LLC
- Financial Planning Analyst with Raymond James
- Dual BA in Economics and Finance from Gordon College.



**David M. Dirk, CFA**  
Portfolio Manager

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

*Experience and Education*

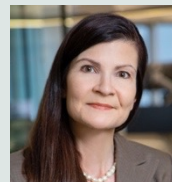
- Director of Portfolio Management and Trading at Boyd Watterson.
- MBA from Case Western Reserve University
- BA from Baldwin-Wallace University

For informational purposes only. As of 12/31/2023

# Investment Team



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



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



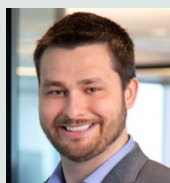
**Anant Goel**  
Portfolio Manager,  
Senior Research  
Analyst



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



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



**Jordan  
Baumhardt, PhD**  
Research Analyst



**Brian Chow,  
PhD**  
Research Analyst



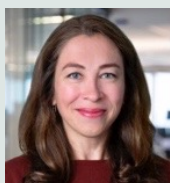
**Westley Dupray,  
CFA**  
Research Analyst



**Bert Kinsey,  
PhD, PharmD**  
Research Analyst



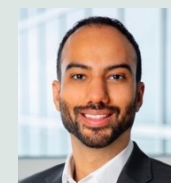
**Claudia Kwan**  
Research Analyst



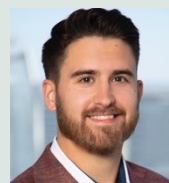
**Faina Rozental**  
Research Analyst



**Christian Say**  
Research Analyst



**Reginald Smith**  
Research Analyst



**Nicholas  
Leibold, CFA**  
Research Analyst



**Alexandra  
Cobourn**  
Associate Research  
Analyst

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# Trading Team

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**Colin Delaney**  
Head of Trading, Portfolio  
Specialist



**Conor Kelly**  
Trader

For informational purposes only. As of 12/31/2023.



# Business 360<sup>®</sup> Research Team

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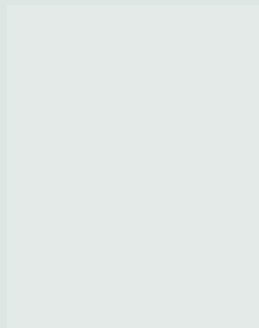
**Tyler Frugia**  
Chief  
Information  
Officer, Director  
of Business 360



**Brock Treworgy,**  
**CAMS, CFE**  
Business 360  
Research  
Manager



**Abel Ballew**  
Business 360  
Research  
Analyst



**Jaime Joshua**  
Business 360  
Research  
Analyst

For informational purposes only. As of 12/31/2023.

# Investment Philosophy

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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 companies may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive gains, 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<sup>®</sup> framework with fixed income expertise.
- The Business 360<sup>®</sup> 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. We refer to long-term secular investment themes as those that tend to be persistent through market conditions.

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

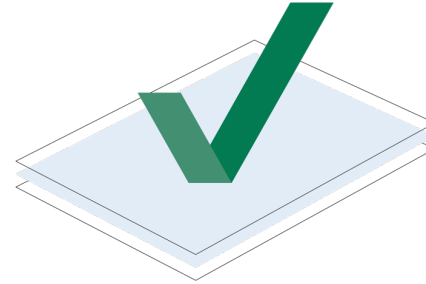
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There are three dimensions to our approach to values-based investing:



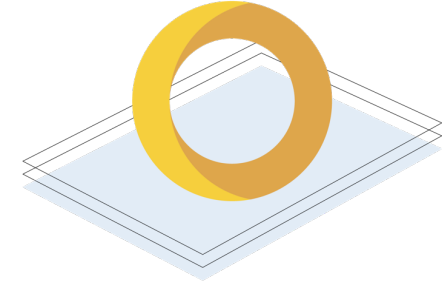
## **AVOID**

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



## **EMBRACE**

Conduct original Business 360<sup>®</sup> 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<sup>®</sup> 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>

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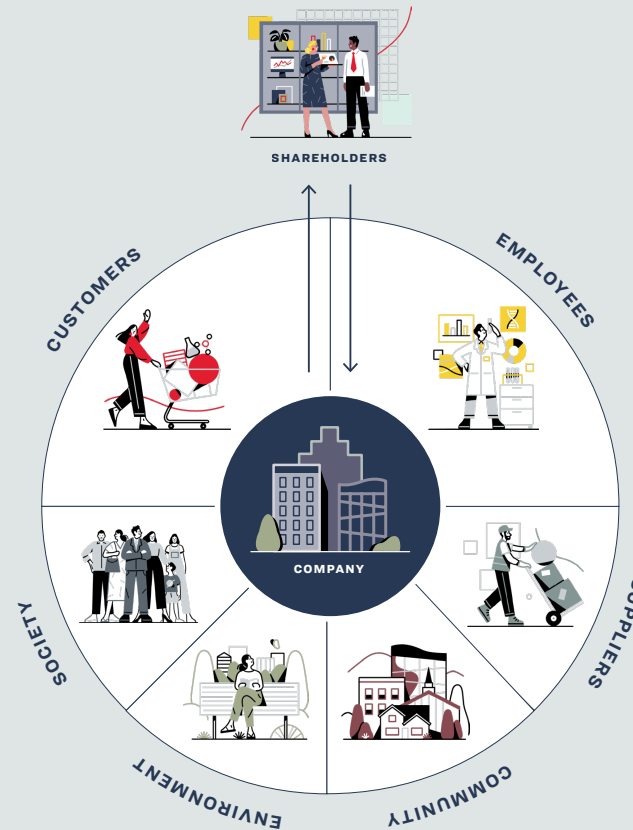
Our **proprietary framework** for evaluating both a company's **long-term competitive advantage** and its impact on **human flourishing** by analyzing its **operations and strategy** through the lens of **key stakeholders**.

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:

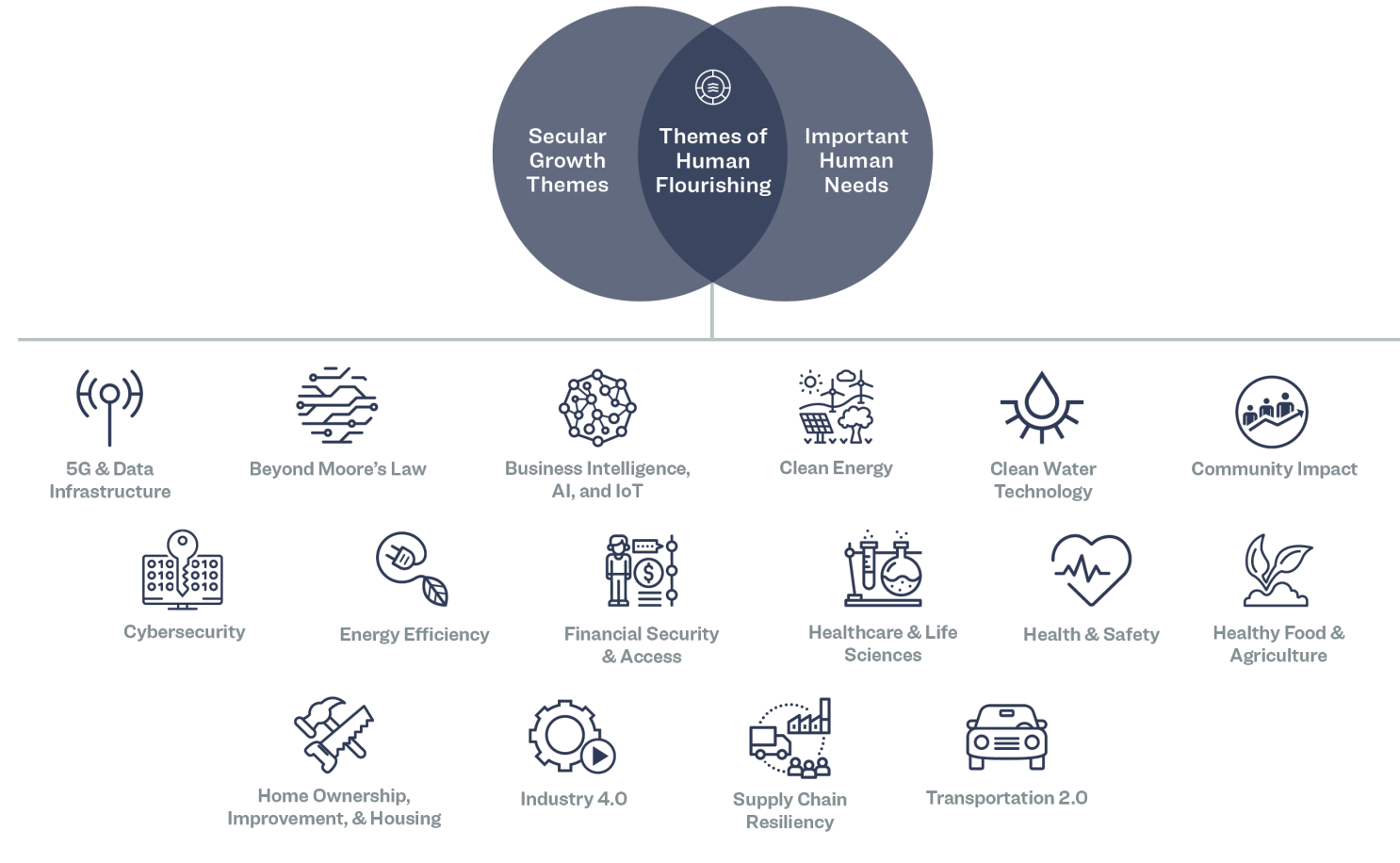
- Higher customer loyalty
- Higher productivity
- Resilient supply chains
- Stronger brands
- Sustainable productive yield

Reference to Eventide's Business 360<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. The term "smart" is used for informational purposes only, and does not imply a certain level of skill of training by the Adviser.



# Investment Themes

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



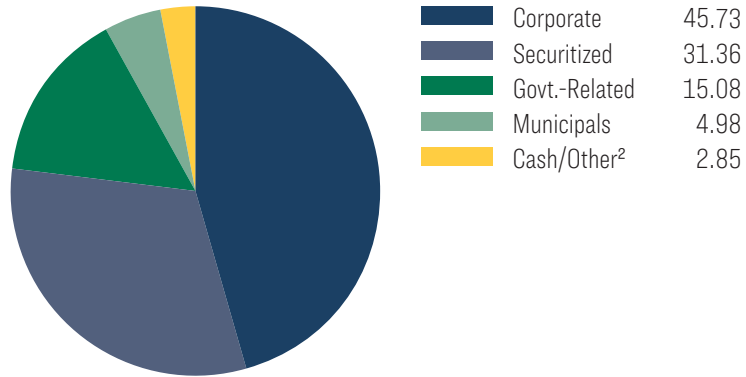
These are representative examples of themes in the Eventide Strategies. The Adviser's judgment about secular themes may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses. We refer to long-term secular investment themes as those that tend to be persistent through market conditions.

# Composition

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

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

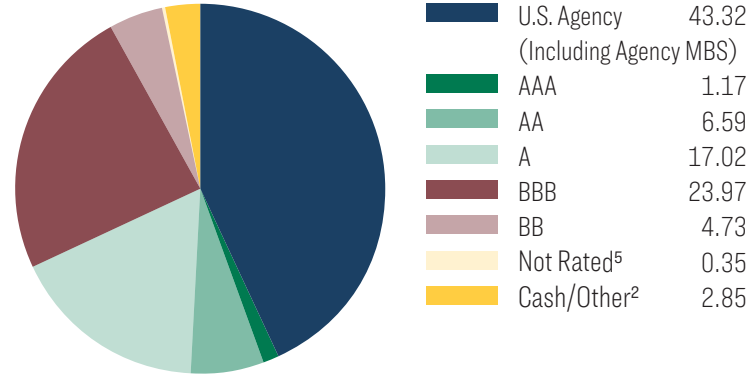
31 Dec 2023



Average Effective Duration<sup>3</sup>: 6.03 years  
Number of holdings: 89

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

31 Dec 2023



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. Source: Morningstar, 09/30/2023. 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. Ratings (other than U.S. securities issued or backed by U.S. agencies) are a blend of a security's Moody's, S&P, Fitch, and DBRS Morningstar ratings calculated by Bloomberg. The rating agencies are evenly weighted when calculating the composite. It is calculated by taking the average of the existing ratings, rounded down to the lower rating in case the composite is between two ratings. A composite will not be generated if the bond is rated by only one of the four rating agencies. This composite is not intended to be a credit opinion. 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. Not Rated indicates that a bond has not been rated by a sufficient number of rating agencies to generate a composite rating using the methodology employed by Bloomberg.

# Returns, Distributions & Yield

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

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

	31 Dec 2023							
	YTD	3-mos	1-year	3-year <sup>2</sup>	5-year	10-year	Since Inception <sup>2</sup>	Inception Date <sup>2</sup>
<i>Eventide Core Bond Fund</i>								
Class I	5.05	6.43	5.05	-3.86	—	—	-3.48	07/31/2020
Class A without load	4.90	6.46	4.90	-4.09	—	—	-3.70	07/31/2020
Class A with 5.75% load <sup>3</sup>	-1.18	0.33	-1.18	-5.98	—	—	-5.35	07/31/2020
Class C <sup>4</sup>	4.16	6.21	4.16	-4.81	—	—	-4.40	07/31/2020
Class N	4.97	6.38	4.97	-4.06	—	—	-3.67	07/31/2020
<i>Benchmark</i>								
Bloomberg U.S. Aggregate Bond Index <sup>5</sup>	5.53	6.82	5.53	-3.31	—	—	-2.97	07/31/2020

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

	31 Dec 2023									
<i>Dec 2022 – Dec 2023</i>	Class I	Class A	Class C	Class N	SEC 30-Day Yield <sup>8</sup>	Class I	Class A	Class C	Class N	
Distributions <sup>6</sup>	\$0.23	\$0.21	\$0.15	\$0.22	Subsidized (Waiver)	3.97%	3.50%	2.97%	3.77%	
12-Month Yield <sup>7</sup>	2.80%	2.54%	1.83%	2.61%	Unsubsidized (No Waiver)	3.86%	3.40%	2.87%	3.66%	

*Eventide Core Bond Fund expenses: Class I, Gross Expenses 0.81%, Net Expenses 0.58%; Class A, Gross Expenses 1.06%, Net Expenses 0.83%; Class C, Gross Expenses 1.81%, Net Expenses 1.58%; Class N, Gross Expenses 1.01%, Net Expenses 0.78%. The adviser has contractually agreed to waive fees and/or reimburse expenses of the Fund through 10/31/2024. The agreement may be terminated by the Fund's Board of Trustees only 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).**

- 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.
- Performance figures for periods greater than 1 year are annualized. Annualized since inception figures use an inception date of 07/31/2020.
- 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.
- A 1.00% contingent deferred sales charge ("CDSC") may be assessed on C-shares redeemed within twelve months of purchase.
- 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.
- 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.
- 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.
- SEC Yield is based on a 30-day (or one-month) period ending 12/31/2023 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.

# Calendar Year Returns

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

## Calendar Year Returns<sup>1</sup> (%)

	2021–2023		
	2021	2022	2023
Eventide Core Bond Fund I	-2.49	-13.05	5.05
Bloomberg U.S. Aggregate Bond Index <sup>2</sup>	-1.54	-13.01	5.53

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.

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# Market Risk

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

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

	<i>Std. Dev.</i>		<i>Beta</i>		<i>Alpha (%)</i>		<i>R-Squared (%)</i>	
	<i>3-year</i>	<i>Inception<sup>2</sup></i>	<i>3-year</i>	<i>Inception<sup>2</sup></i>	<i>3-year</i>	<i>Inception<sup>2</sup></i>	<i>3-year</i>	<i>Inception<sup>2</sup></i>
Eventide Core Bond I	6.96	6.61	0.95	0.96	-0.86	-0.75	98.36	97.89
Bloomberg U.S. Aggregate Bond Index <sup>3</sup>	7.24	6.82	1.00	1.00	—	—	100.00	100.00

31 Dec 2023

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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



TM

## Overall Morningstar Rating™ US Fund Intermediate Core Bond (425 funds)

as of December 31, 2023<sup>1</sup>  
based on Morningstar Risk-Adjusted  
Return

1. Eventide Core Bond I class was rated 2 stars against 425 Intermediate Core Bond funds for the 3 Yr period, based on Morningstar Risk-Adjusted Return.

**Past performance is no guarantee of future results.** Morningstar percentile rankings pertain to the I share class only; other classes may have different performance characteristics.

The Morningstar Rating™ for funds, or 'star rating', is calculated for managed products (including mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed-end funds, and separate accounts) with at least a three-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The Morningstar Rating does not include any adjustment for sales loads. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics. The weights are: 100% three-year rating for 36-59 months of total returns, 60% five-year rating/40% three-year rating for 60-119 months of total returns, and 50% 10-year rating/30% five-year rating/20% three-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent three-year period actually has the greatest impact because it is included in all three rating periods. Ratings are determined monthly and subject to change.

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# Morningstar Ratings



TM



## US Fund Intermediate Core Bond (3258 funds)

as of November 30, 2023

**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 it 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



TM

**Top 82% 1yr returns (471 funds)**

**Top 87% 3yr returns (425 funds)**

Percentile Ranking, US Fund  
Intermediate Core Bond  
for December 31, 2023, 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**  
Head of Advisor  
Sales



**Michael Schnackenberg**  
Head of  
Institutional  
Sales



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



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



**Greg Gunter**  
Regional  
Director,  
**Southeast  
Region**



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



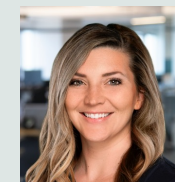
**Jacob Seif,**  
**CIMA®, CFP®**  
Regional  
Director, **South  
Region**



**Colby Smidt**  
Regional  
Director,  
**Mountain States  
and Pacific  
Northwest**



**Spencer Martin**  
Regional  
Director,  
**Midwest Region**



**Ally Espinosa**  
Regional  
Director, **West  
Coast Region**



**Matt McEathron**  
Regional  
Director,  
Institutional  
Sales

For informational purposes only. As of 12/31/2023.

# Investment Consulting Group

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



**Fred Ge, CFA**  
Senior Portfolio  
Consultant



**Robert Carney**  
Senior Manager,  
Institutional  
Services

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**Eventide Asset Management, LLC | One International Place, Ste. 4210 | Boston, MA 02110 | 877-771-EVEN (3836)**