

Seeks to provide current income with growth of capital as a secondary objective.

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

Inception Date 07/31/2006

Morningstar® Category Moderately Conservative Allocation

Lipper Peer Group Mixed-Asset Target Allocation Moderate

Overall Morningstar Rating™ (I-Share)*



441 Products | Moderately Conservative Allocation Category Based on Risk-Adjusted Returns as of 3/31/24

Portfolio Managers from Wellington Management

Scott I. St. John, CFA

Senior Managing Director
Fixed-Income Portfolio Manager
Professional Experience Since 1994

Matthew Hand, CFA

Senior Managing Director
Equity Portfolio Manager
Professional Experience Since 1997

Adam H. Ilfelder, CFA

Senior Managing Director
Equity Portfolio Manager
Professional Experience Since 1997

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

Expenses (%)¹

| | A | F | I | Y |
|-------|------|------|------|------|
| Gross | 0.88 | 0.55 | 0.63 | 0.66 |
| Net | 0.88 | 0.55 | 0.63 | 0.66 |

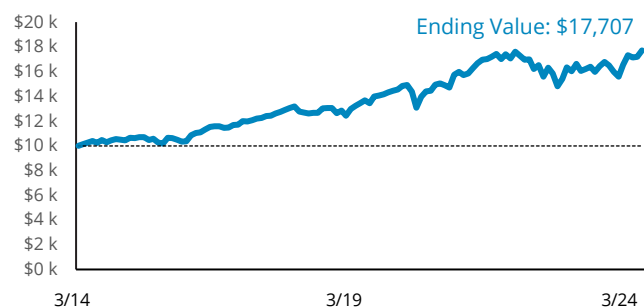
Performance (%)

| Class | QTD | YTD | Average Annual Total Returns | | | | | SI |
|------------------------------|------|------|------------------------------|--------|--------|---------|------|----|
| | | | 1 Year | 3 Year | 5 Year | 10 Year | | |
| A | 2.18 | 2.18 | 8.94 | 2.56 | 5.40 | 5.62 | 6.51 | |
| A with 5.5% Max Sales Charge | — | — | 2.95 | 0.65 | 4.21 | 5.02 | 6.17 | |
| F | 2.26 | 2.26 | 9.37 | 2.89 | 5.74 | 5.95 | 6.76 | |
| I | 2.24 | 2.24 | 9.20 | 2.81 | 5.66 | 5.88 | 6.72 | |
| Y | 2.20 | 2.20 | 9.19 | 2.79 | 5.63 | 5.90 | 6.86 | |
| Blended Index | 4.03 | 4.03 | 12.17 | 2.78 | 5.66 | 5.71 | — | |
| Morningstar Category | 3.24 | 3.24 | 10.10 | 1.76 | 4.65 | 4.30 | — | |
| Lipper Peer Group | 4.54 | 4.54 | 13.15 | 2.96 | 6.16 | 5.34 | — | |

Share Class Inception: A, Y - 7/31/06; F - 2/28/17; I - 2/26/10. Performance shown prior to the inception of a class reflects performance and operating expenses of another class(es) (excluding sales charges, if 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 7/31/06. Performance and expenses for other share classes will vary. Additional information is in the prospectus. Only Class A assesses a sales charge.

The Blended Index consists of 45% Russell 1000 Value Index, 44% Bloomberg Corporate Index, 5.5% JP Morgan Emerging Markets Bond Index Plus, and 5.5% Bloomberg U.S. Corporate High-Yield Bond 2% Issuer Cap Index. Indices are unmanaged and not available for direct investment.

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



Calendar Year Returns (%)

| | |
|------|-------|
| 2023 | 7.95 |
| 2022 | -8.85 |
| 2021 | 10.15 |
| 2020 | 7.72 |
| 2019 | 19.35 |
| 2018 | -4.81 |
| 2017 | 11.75 |
| 2016 | 11.44 |
| 2015 | -0.19 |
| 2014 | 7.92 |

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.

¹ 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 Wellington Management Company LLP. HFMC and Wellington Management are SEC registered investment advisers. HFD and HFMC are not affiliated with any sub-adviser.

Hartford Balanced Income Fund

| Equity Sector Exposure (%) | |
|----------------------------|----|
| Financials | 19 |
| Health Care | 17 |
| Consumer Staples | 11 |
| Industrials | 11 |
| Energy | 10 |
| Information Technology | 8 |
| Utilities | 8 |
| Materials | 6 |
| Real Estate | 6 |
| Consumer Discretionary | 4 |
| Communication Services | 1 |

Based on Global Industry Classification Standard (GICS), which was developed by and is the exclusive property and a service mark of MSCI Inc. (MSCI) and Standard & Poor's, a division of The McGraw-Hill Companies, Inc. (S&P). Excludes cash. May not total to 100% due to rounding and/or pooled vehicle allocations.

| Top Ten Equity Holdings (%) | |
|-----------------------------------|--------------|
| Merck & Co., Inc. | 1.76 |
| JP Morgan Chase & Co. | 1.60 |
| Pfizer, Inc. | 1.34 |
| Johnson & Johnson | 1.20 |
| ConocoPhillips | 1.15 |
| EOG Resources, Inc. | 1.12 |
| Cisco Systems, Inc. | 0.98 |
| MetLife, Inc. | 0.97 |
| Philip Morris International, Inc. | 0.95 |
| General Dynamics Corp. | 0.86 |
| Percentage Of Portfolio | 11.93 |

| Fixed-Income Allocation (%) | |
|--|----|
| Investment Grade Credit | 77 |
| High Yield Credit | 11 |
| United States Government | 4 |
| Emerging Market Debt | 4 |
| Cash, Cash Equivalents and Cash | 1 |
| Offsets | 1 |
| Other | 1 |
| Developed Government and Related (Non-US \$) | 1 |
| Asset Backed Securities | 0 |
| Bank Loans | 0 |
| Commercial Mortgage Backed Securities | 0 |
| Mortgage Backed Securities | 0 |

| Top Ten Fixed-Income Issuers (%) | |
|----------------------------------|-------------|
| U.S. Treasury Bonds | 1.31 |
| Wells Fargo & Co. | 1.30 |
| JP Morgan Chase & Co. | 1.07 |
| U.S. Treasury Notes | 0.99 |
| Morgan Stanley | 0.94 |
| Bank of America Corp. | 0.92 |
| Oracle Corp. | 0.80 |
| HSBC Holdings PLC | 0.68 |
| Pacific Gas & Electric Co. | 0.64 |
| Goldman Sachs Group, Inc. | 0.54 |
| Percentage Of Portfolio | 9.19 |

| | |
|--------------------------------|----------------|
| Net Assets | \$12.7 billion |
| % in Equities | 44% |
| % in Bonds | 55% |
| % in Cash and Cash Equivalents | 2% |
| Standard Deviation (3 yrs) | 11.01% |
| Turnover | 57% |
| Dividend Frequency | Quarterly |

Fixed Income Characteristics

| | |
|---------------------------|------------|
| # of Fixed-Income Issuers | 610 |
| Effective Duration | 6.60 years |

Yields (Class I)

| | |
|-------------------------------|-------|
| 30-Day SEC Yield | 3.92% |
| Unsubsidized 30-Day SEC Yield | 3.92% |

Equity Characteristics

| | |
|--------------------------------------|---------|
| # of Equity Holdings | 67 |
| Price/Earnings | 12.8x |
| Price/Book | 2.6x |
| EPS Growth Rate | 8.6% |
| Return on Equity | 19.2% |
| Asset Weighted Market Cap (billions) | \$124.3 |
| Median Market Cap (billions) | \$45.5 |

Market Cap Distribution (%)

| | |
|----------------------------|-----|
| Less than \$2 billion | 0 |
| \$2 billion - \$5 billion | 0 |
| \$5 billion - \$10 billion | 0 |
| Greater than \$10 billion | 100 |
| Not Classified | 0 |

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. The Fund's strategy for allocating a portion of its assets to specialist portfolio managers, and among different asset classes, may not work as intended. • Fixed income security risks include credit, liquidity, call, duration, 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. • Different investment styles may go in and out of favor, which may cause the Fund to underperform the broader stock market. • 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, regulatory and counterparty risk.

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. **EPS Growth Rate** is the projected growth rate in earnings per share for the next five years. **Effective Duration** measures the sensitivity of an asset or portfolio's price to nominal interest rate movement. **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 price to its earnings 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. **30-Day SEC Yield** reflects the hypothetical net current income earned, after the deduction of a fund's expenses, during a 30-day period, expressed as an annual percentage rate based on the fund's share price at the end of the period. Actual income distributions will usually differ. **Unsubsidized 30-Day SEC Yield** is the Fund's 30-Day SEC yield without the impact of fee/expense waivers. **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.

Index Provider Notices may be found at hartfordfunds.com/index-notices.

*Class I-Shares Star Ratings: 3-year 4 stars out of 441 products, 5-year 4 stars out of 409 products, and 10-year 5 stars out of 297 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. ©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.