

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

## 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

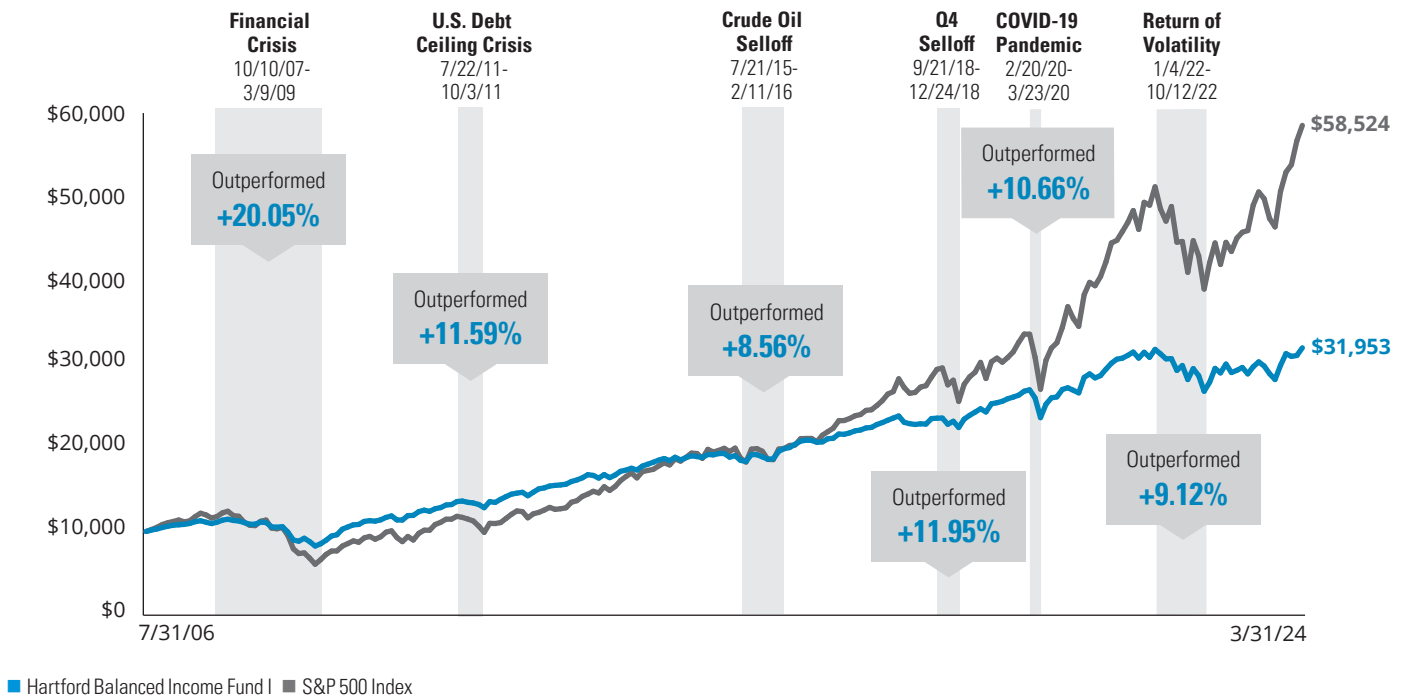
Dividend-paying stocks and investment-grade bonds provide investments that you can feel confident investing in for the long run. A small allocation to high-yield and emerging-market bonds can help enhance returns and income.

### 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: 7/31/06-3/31/24)



Source: Morningstar, 4/24.

**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.

[hartfordfunds.com](https://www.hartfordfunds.com)

888-843-7824

[hartfordfunds.com/linkedin](https://www.hartfordfunds.com/linkedin)

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



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

**Portfolio Managers from Sub-Adviser Wellington Management**

**Scott I. St. John, CFA**

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

**Matthew Hand, CFA**

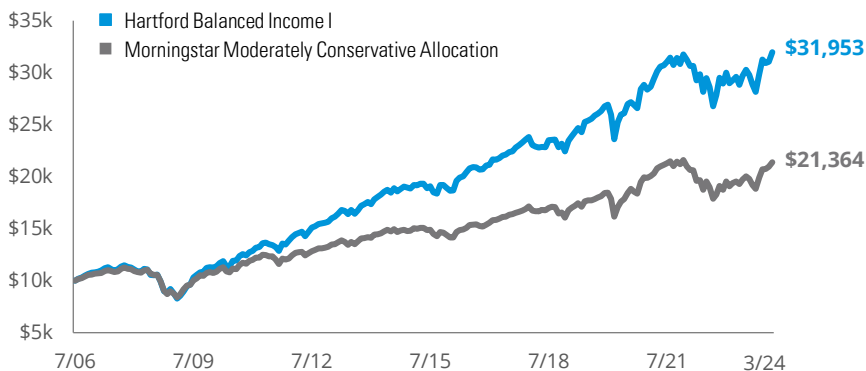
Senior Managing Director  
Equity Portfolio Manager  
Professional Experience Since 1997

**Adam H. Illfelder, CFA**

Senior Managing Director  
Equity Portfolio Manager  
Professional Experience Since 1997

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

**Growth of a \$10,000 Investment (Class I) (7/31/06-3/31/24)**



**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
<b>Percentage Of Portfolio</b>	<b>11.93</b>

**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
<b>Percentage Of Portfolio</b>	<b>9.19</b>

**Performance (%) as of 3/31/24**

	YTD	Average Annual Total Returns				
		1 Year	3 Year	5 Year	10 Year	Since Inception
Hartford Balanced Income Fund I	2.24	9.20	2.81	5.66	5.88	6.72
Blended Index <sup>1</sup>	4.03	12.17	2.78	5.66	5.71	—
Morningstar Moderately Conservative Allocation Cat Avg	3.24	10.10	1.76	4.65	4.30	—

**Expenses<sup>2</sup>** Net: 0.63% Gross: 0.63%

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 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.

<sup>1</sup>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.

<sup>2</sup>Expenses as shown in the Fund's most recent prospectus.

\*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.

**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.

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. Please read it carefully before investing.

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