

U.S. equity fund Investor fact sheet

John Hancock U.S. Growth Fund

A: JSGAX C: JSGCX I: JSGIX R2: JSGRX R4: JHSGX R6: JSGTX

Summary

Objective
Long-term capital appreciation

Use for
Core large-cap growth holding

Morningstar category
Large Growth

Strategy

Quality growth companies

Targeting high-quality, growing companies to potentially limit participation in falling markets while keeping pace in rising markets

A proven approach

Focusing on time-tested measures of free cash flow, organic growth, valuation, capital returns, and earnings expectations

Veteran portfolio management

With two decades of disciplined stock-picking experience, employing a rigorous process through every market environment

Managed by¹

WELLINGTON MANAGEMENT[®]



John A. Boselli, CFA
On the fund since 2016.
Investing since 1996



Tim N. Manning
On the fund since 2021.
Investing since 1996

Morningstar ratings^{TM2}

Large Growth

	Overall	3 year	5 year	10 year
Class I	★★★★	★★★	★★★★	★★★★
Class A	★★★★	★★★	★★★★	★★★★
Number of funds	1,131	1,131	1,054	804

Overall rating is based on 3-, 5-, and 10-year Morningstar Risk-Adjusted Returns and accounts for variation in a fund's monthly performance. Other share classes may be rated differently. Hollow stars indicate Morningstar's extended performance rating.

Average annual total returns^{3,4,5}

	Qtd	Ytd	1 yr	3 yr	5 yr	10 yr	Life of fund	Life of fund date
Class I without sales charge	2.70	-26.50	-26.50	5.60	9.62	12.94	13.33	12/20/11
Class A without sales charge	2.63	-26.70	-26.70	5.33	9.34	12.62	13.00	12/20/11
Class A with sales charge	-2.52	-30.37	-30.37	3.54	8.22	12.04	12.47	12/20/11
Russell 1000 Growth Index	2.20	-29.14	-29.14	7.79	10.96	14.10	14.54	—
Large growth category	3.06	-30.20	-30.20	4.28	7.89	11.40	—	—

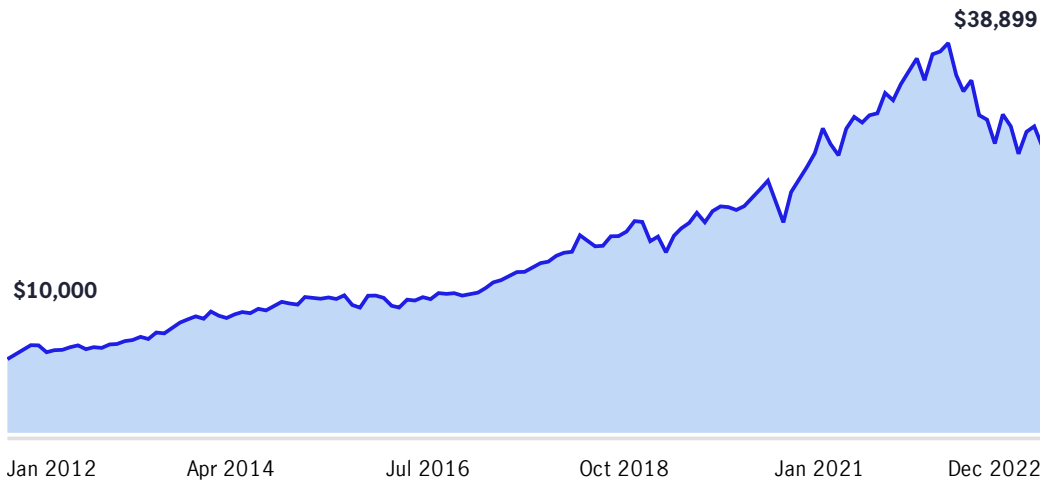
Expense ratios ⁶	Gross	Net (what you pay)	Contractual through
Class I	0.71%	0.71%	—
Class A	0.96%	0.96%	—

The past performance shown here reflects reinvested distributions and the beneficial effect of any expense reductions, and does not guarantee future results. The sales charge for Class A shares, reflects the maximum sales charge of 5.0%. For Class I shares, there is no sales charge. Returns for periods shorter than one year are cumulative, and results for other share classes will vary. Shares will fluctuate in value and, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance cited. For the most recent month-end performance, visit jhinvestments.com.

1 The portfolio managers listed here reflect recent changes to the portfolio team. Please see the prospectus for details. **2** For each managed product, including mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed-end funds, and separate accounts, with at least a 3-year history, Morningstar calculates a Morningstar RatingTM based on a Morningstar Risk-Adjusted Return that accounts for variation in a fund's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. Exchange-traded funds and open-end mutual funds are considered a single population for comparative purposes. The top 10.0% of funds in each category, the next 22.5%, 35.0%, 22.5%, and bottom 10.0% receive 5, 4, 3, 2, or 1 star(s), respectively. The overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its 3-, 5-, and 10-year (if applicable) Morningstar Rating metrics. The rating formula most heavily weights the 3-year rating, using the following calculation: 100% 3-year rating for 36 to 59 months of total returns, 60% 5-year rating/40% 3-year rating for 60 to 119 months of total returns, and 50% 10-year rating/30% 5-year rating/20% 3-year rating for 120 or more months of total returns. Star ratings do not reflect the effect of any applicable sales load. **Morningstar's extended performance** rating is calculated by adjusting the historical total returns of the oldest share class to reflect the fee structure of a younger share class, and then compounding the combined record of actual and adjusted performance into the 3-, 5-, and 10-year time periods necessary to produce Morningstar Risk-Adjusted Returns and a Morningstar Rating. Extended performance ratings do not affect actual Morningstar ratings; the overall ratings for multi-share class funds are based on actual performance only or extended performance only. Once a share class turns 3 years old, the overall Morningstar Rating will be based on actual ratings only. Adjusted historical performance is only an approximation of actual returns, and Morningstar's calculation methodology may differ from those used by other entities. Past performance does not guarantee future results. **3** On 9/28/18, Wellington Management Company LLP replaced the fund's manager, John Hancock Asset Management (predecessor manager). Performance prior to 9/28/18 reflects the performance of the predecessor manager. **4** The Russell 1000 Growth Index tracks the performance of publicly traded large-cap companies in the United States with higher price-to-book ratios and higher forecasted growth values. It is not possible to invest directly in an index. **5** The S&P 500 Index tracks the performance of 500 of the largest publicly traded companies in the United States. It is not possible to invest directly in an index. **6** "Net (what you pay)" represents the effect of a contractual fee waiver and/or expense reimbursement and is subject to change.

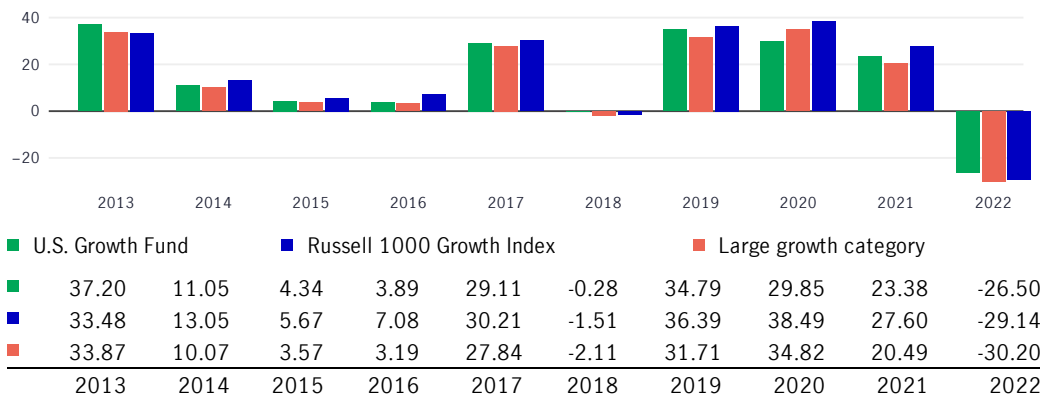
Growth of a hypothetical \$10,000 investment¹⁴

Class I without sales charge – 1/1/12 – 12/31/22



Calendar year returns^{14,15}

Class I without sales charge



What you should know before investing

Growth stocks may be more susceptible to earnings disappointments. Foreign investing, especially in emerging markets, has additional risks, such as currency and market volatility and political and social instability. Please see the fund's prospectus for additional risks.

Request a prospectus or summary prospectus from your financial professional, by visiting jhinvestments.com, or by calling us at 800-225-5291. The prospectus includes investment objectives, risks, fees, expenses, and other information that you should consider carefully before investing.

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7 The portfolio turnover is as of the fund's fiscal year end and is subject to change. The fund's annual report includes further details regarding the portfolio turnover ratio. **8** FactSet. Average market cap is based on a weighted average. **9** Beta measures the sensitivity of the fund to its benchmark. The beta of the market (as represented by the benchmark) is 1.00. Accordingly, a fund with a 1.10 beta is expected to have 10% more volatility than the market. **10** R-squared is a measurement that indicates how closely a fund's performance correlates with the performance of its benchmark index. R-squared can range from 0.00 to 1.00, with 1.00 indicating perfect correlation to the index. **11** Sharpe ratio is a measure of excess return per unit of risk, as defined by standard deviation. A higher Sharpe ratio suggests better risk-adjusted performance. **12** Standard deviation is a statistical measure of the historic volatility of a portfolio. It measures the fluctuation of a fund's periodic returns from the mean or average. The larger the deviation, the larger the standard deviation and the higher the risk. **13** Upside capture ratio measures a manager's performance in up markets relative to the market itself. Downside capture ratio measures a manager's performance in down markets relative to the market itself. **14** Performance data shown excludes fees and expenses. The performance data would be lower if such fees and expenses were included. Past performance does not guarantee future results. **15** Returns for the fund's first year are since fund inception. **16** Listed holdings reflect the largest portions of the fund's total and may change at any time. They are not recommendations to buy or sell any security. Data is expressed as a percentage of net assets and excludes cash and cash equivalents. Fund characteristics will vary over time.

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Key facts

Total net assets	\$910.02 m
Portfolio turnover⁷ (%)	91
Number of holdings	55
Benchmark	Russell 1000 Growth TR
Average market cap⁸	
Fund	\$533.25 b
Benchmark	\$627.37 b
Beta⁹	0.93
R-squared¹⁰ (%)	97.00
Sharpe ratio¹¹	0.49
Standard deviation¹² (%)	
Fund	19.54
Benchmark	20.70
Upside capture ratio¹³ (%)	91.89
Downside capture ratio¹³ (%)	93.73

Based on Class I shares for the five-year period.

10 largest holdings¹⁶

	%
1. Microsoft Corp.	10.85
2. Apple, Inc.	8.77
3. Alphabet, Inc., Class A	5.53
4. Visa, Inc.	3.68
5. UnitedHealth Group, Inc.	3.60
6. Mastercard, Inc.	3.22
7. Eli Lilly & Company	2.47
8. Gartner, Inc.	2.10
9. Accenture PLC	1.96
10. Charles Schwab Corp.	1.91

Sector composition¹⁶

	%
Information Technology	43.02
Health Care	15.14
Financials	12.18
Consumer Discretionary	10.13
Communication Services	8.87
Industrials	4.67
Energy	2.64
Real Estate	2.19
Consumer Staples	1.14