



# MORNINGSTAR® TOOLS AT YOUR FINGERTIPS

As part of its suite of online information, Sun Life offers you tools from Morningstar®, a leading provider of investment news and analysis. These tools can help you better understand the investment options offered in your plan.

To access these great features, sign in to the Plan Member Services website, [mysunlife.ca](https://mysunlife.ca), using your sign-in/access ID and password. Under the **my financial future** section of the **Home** page, select **my financial centre**, then select **Investment performance** under the **Accounts** drop-down menu.

#### **Don't have a sign-in/access ID or password?**

Go to [mysunlife.ca](https://mysunlife.ca) and select **Register**. You will need your account number (available on your welcome letter or your statement) and the last three digits of your Social Insurance Number.

If you have forgotten your sign in/access ID and/or password, go to [mysunlife.ca](https://mysunlife.ca) and select the appropriate link under **Sign-in help**.



## Morningstar® tools



**Investment performance** Print

**Rates of Return and Unit Values** | [Fund Report](#) | [Market Indices](#) | [Fund Quickrank™](#) | [Instant X-Ray™](#) | [Updates](#)

Select a plan to review :  
Defined Contribution Pension Plan (DCPP) ▾

Go to [personal rates of return](#) to find out how your investments are performing.

Go green, go paperless!

### Rates of Return and Unit Values

See the performance of funds available in your plan.

### Fund Report

Access tools and information about your funds.

### Market Indices

This section includes indices to help you better understand key drivers in the marketplace.

### Instant X-Ray

This tool replaces the old Portfolio X-Ray tool and provides you with more detailed information including a portfolio overview and various portfolio performance metrics of your investments.

### Fund Quickrank™ tool

This tool allows you to search and compare funds side-by-side and is similar to the Fund Compare tool that was previously available. You can research, analyze and compare the funds offered in your plan using different criteria.

### Updates

This is a custom Sun Life tool that allows Sun Life to publish relevant fund manager and fund updates to you.

## We're here to help



**Go mobile:** Check your balances and see how your funds are doing. Download the **my Sun Life mobile app** on Google Play or the Apple App Store.



Call us at **1-877-908-0301**  
Monday to Friday  
8 a.m. to 8 p.m. ET.



Visit **mysunlife.ca** for tools, articles and videos. Sign in and select **Chat live now** to get live support.



Consider speaking with a financial advisor (registered as a financial security advisor in Quebec) of your choice to get personalized advice about your personal investment strategy.