

## Hartford Moderately Aggressive Allocation Fund

**Tickers** A: HRAAX C: HRACX F: HRAFX I: HRAIX R3: HRARX R4: HRASX R5: HRATX

**Morningstar® Category** Global Moderately Aggressive Allocation **Inception Date** 5/28/04

### Market Overview

Global markets in the fourth quarter were shaped by the interplay of central bank policy, shifting rate expectations, and recurring geopolitical and trade-related headlines. The Federal Reserve lowered rates at its final meeting of the year, but investors continued to debate how quickly additional easing might unfold as growth signals stayed resilient and inflation readings were interpreted through the lens of data disruptions tied to the government shutdown. Equity markets advanced in a more selective fashion, with ongoing enthusiasm around AI-related investment alongside periodic rotations that favored smaller-cap and value segments at times versus the most crowded mega-cap areas. Outside the U.S., a weaker dollar and relatively more attractive valuations supported international equities; within that, emerging markets also posted gains but tended to trail developed markets modestly, with dispersion across countries and style factors remaining an important driver of results. Meanwhile, intermittent tariff developments and geopolitical risks—including renewed tensions in the Middle East and Venezuela—contributed to bouts of volatility that influenced energy pricing and reinforced demand for perceived safe havens such as gold.

### Performance Summary

- Hartford Moderately Aggressive Allocation Fund (I share) was in line with its benchmark during the period.
- The main driver of the fund's underperformance versus the benchmark was performance of the underlying positions relative to their individual benchmarks. In particular, Hartford Core Equity Fund, Hartford World Bond Fund and Hartford Schrodgers International Contrarian Value Fund underperformed their respective benchmarks.
- Asset allocation decisions did not materially impact performance during the period.

### Positioning & Outlook

- Our stance remains overweight equities and underweight fixed income, with balanced regional and style exposure. We expect lower US interest rates and increased government spending in Europe, Japan, and China to support equity markets and economic growth, while tight spreads\* limit upside across fixed income markets.
- We expect steadier markets as rates move lower and fiscal support continues, but current optimism limits room for disappointment. We prefer cyclical and quality growth companies and maintain a slight large-company bias.

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

★★★★

177 Products

Global Moderately Aggressive Allocation Category Based on Risk-Adjusted Returns as of 12/31/2025

#### Portfolio managers from Hartford Funds and years of experience

Vernon J. Meyer, CFA, 39 years  
Allison Mortensen, CFA, 32 years  
Jim Glendon, CFA, 17 years

#### Top Holdings (%)

Hartford Core Equity Fund	21.04
Hartford Large Cap Growth ETF	10.65
Hartford Equity Income Fund	10.30
Hartford International Opportunities Fund	7.90
Hartford Multifactor Developed Markets (ex-US) ETF	6.52
Hartford World Bond Fund	5.48
Hartford US Quality Growth ETF	5.22
Hartford US Value ETF	5.17
Hartford Core Bond ETF	4.90
Hartford Schrodgers International Contrarian Value Fund	4.68
Hartford International Growth Fund	4.22
Hartford Schrodgers Emerging Markets Equity Fund	3.29
Hartford Schrodgers Core Fixed Income Fund	2.74
Hartford Strategic Income ETF	2.73
Hartford Small Company Fund	2.47
Hartford Small Cap Value Fund	2.47
<b>Percentage Of Portfolio</b>	<b>99.78</b>

Holdings and characteristics are subject to change. Percentages may be rounded.

\***Spreads** are the difference in yields between two fixed-income securities with the same maturity but originating from different investment sectors.

Effective 5/1/25, the Fund (formerly, The Hartford Growth Allocation Fund) changed its name.

## Average Annual Total Returns (%)

Class	QTD	YTD	1 Year	3 Year	5 Year	10 Year	SI	Expenses <sup>1</sup>	
								Gross	Net
A	2.72	17.24	17.24	15.85	8.14	8.94	7.06	1.06%	1.06%
A with 5.5% Max Sales Charge	—	—	10.79	13.69	6.92	8.32	6.78	—	—
F	2.84	17.70	17.70	16.28	8.55	9.35	7.41	0.68%	0.68%
I	2.81	17.61	17.61	16.19	8.43	9.25	7.37	0.78%	0.78%
R3	2.62	16.91	16.91	15.47	7.77	8.59	6.76	1.40%	1.40%
R4	2.77	17.30	17.30	15.82	8.11	8.91	7.06	1.09%	1.09%
R5	2.78	17.66	17.66	16.19	8.44	9.25	7.34	0.78%	0.78%
Benchmark	2.81	18.86	18.86	17.46	9.20	10.49	—	—	—
Morningstar Category	2.54	18.30	18.30	14.77	8.25	8.83	—	—	—

**Morningstar® Category** Global Moderately Aggressive Allocation

**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](http://hartfordfunds.com).**

Share Class Inception: A - 5/28/04; F - 2/28/17; I - 8/31/06; R3, R4, R5 - 12/22/06. 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 5/28/04. Performance and expenses for other share classes will vary. Additional information is in the prospectus. Only Class A assesses a sales charge. Performance for periods of less than one year is not annualized.

Benchmark: The Blended Index consists of 20% Bloomberg US Aggregate Bond Index, 55% Russell 3000 Index and 25% MSCI ACWI ex USA Index (net of dividend withholding tax). Indices are unmanaged and not available for direct investment.

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<sup>1</sup>Expenses are the total annual operating expenses from the Fund's most recent prospectus at the time of publication.

\*Class I-Shares Star Ratings: 3-year 4 stars out of 177 products, 5-year 4 stars out of 173 products, and 10-year 3 stars out of 143 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](http://global.morningstar.com/managerdisclosures). ©2026 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 invests in underlying funds in a fund-of-funds structure. The ability of the Fund to meet its investment objective is directly related to the ability of the underlying funds to meet their objectives as well as the investment manager's allocation among those underlying funds. The Fund is subject to the risks of the underlying funds, in direct proportion to the amount of assets it invests in each underlying fund. The underlying funds are subject to the risks specific to their investment strategies, such as market, small- and mid-cap securities, foreign securities, emerging-market securities, fixed-income securities which includes bonds, municipal-related and asset-backed securities, and securities purchased in the To-Be-Announced market, and derivative risks, and to the extent the underlying fund is an ETF, risks associated with ETFs.

**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](http://hartfordfunds.com). Please read it carefully before investing.**

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