

Hartford Climate Opportunities Fund

Tickers A: HEOMX C: HEONX F: HEAFX I: HEOIX R3: HEORX R4: HEOX R5: HEOTX R6: HEOVX Y: HEOYX

Morningstar® Category Global Large-Stock Blend **Inception Date** 2/29/16

Market Overview

Global equities advanced in the fourth quarter, closing 2025 on a positive note despite intermittent volatility. Markets were driven higher by robust AI infrastructure spending, strong corporate earnings, and a liquidity boost from the US Federal Reserve. US inflation remained contained, enabling decisive policy action in response to a softening labor market. The Fed cut interest rates twice during the quarter, ended quantitative tightening, and launched new Reserve Management Purchases to bolster liquidity. Amid a relatively positive economic backdrop, the European Central Bank left rates unchanged, while easing UK inflation led the Bank of England to lower rates in December. In Japan, Sanae Takaichi was elected prime minister as the Liberal Democratic Party formed a minority coalition with the Japan Innovation Party. Markets rallied on the Prime Minister Takaichi's economic-security agenda, lifting nuclear, defense, and tech stocks, while government bond yields climbed on expectations of expansionary fiscal policy to spur economic growth. The Bank of Japan raised its policy rate by 25 basis points to 0.75%, signaling further hikes in 2026. Positive trade developments supported markets and aided the global economy, with the US statutory tariff rate declining to 15.7% by year's end from a daunting 30% peak in April, after US President Donald Trump and Chinese President Xi Jinping agreed to a series of measures to deescalate the trade war. Gold surged to record highs above US\$4,000/oz, while bitcoin slid more than 25% from its peak.

Performance Summary

- Hartford Climate Opportunities Fund (I share) underperformed the MSCI ACWI Index during the quarter.
- Sector allocation, a residual of the portfolio's bottom-up stock selection process, was the driver of relative underperformance. Allocation effect was driven by an overweight to industrials and lack of exposure to healthcare, but was partially offset by an underweight to consumer discretionary.
- Stock selection contributed to relative results. Positive selection was within Communication Services and industrials.
- On a regional basis, security selection within North America detracted most, while selection in the Japan contributed most.
- The top relative detractor over the period was from the lack of exposure to Eli Lilly (healthcare), while the top relative contributor was an overweight position in Vestas Wind Systems (industrials).

Positioning & Outlook

- At the overall fund level, the largest climate theme allocation at the end of the quarter was in energy efficiency, with approximately 33% of the Fund's assets
- Clean Energy was the second-largest thematic allocation, with 17% of the Fund's assets
- The rest of the Fund's assets were allocated to the following climate themes: environmental resource management (16%), sustainable transport (11%), lower carbon leaders (12%), and climate resilient infrastructure (9%).
- At the regional level, 66% of the Fund's assets were invested in US stocks, with 33% in non-US stocks and the remaining balance in cash.
- As volatility continues to present new opportunities and challenges, we remain committed to providing our clients with diversifying exposure to high integrity climate solutions with compelling investment merit. Heading into 2026, we are energized by the idiosyncratic and secular opportunities reflected in the portfolio which demonstrate that climate solutions are at the intersection of timeless priorities of energy and resource efficiency, cost savings, and resiliency.

Portfolio manager from Wellington Management and years of experience

Alan T. Hsu, 26 years

G. Thomas Levering, 33 years

Portfolio managers from Schroders and years of experience

Simon Webber, CFA, 27 years

Isabella Hervey-Bathurst, CFA, 14 years

Top Ten Holdings (%)

Alphabet, Inc.	3.96
Microsoft Corp.	3.17
Infineon Technologies AG	2.66
Hitachi Ltd.	2.42
Amazon.com, Inc.	2.34
Siemens AG	1.95
First Solar, Inc.	1.76
Xylem, Inc.	1.67
Republic Services, Inc.	1.66
Vertiv Holdings Co.	1.62

Percentage Of Portfolio **23.21**

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

Average Annual Total Returns (%)

Class	QTD	YTD	1 Year	3 Year	5 Year	10 Year	SI	Expenses ¹	
								Gross	Net
A	2.43	18.38	18.38	11.81	5.40	—	11.11	1.17%	1.17%
A with 5.5% Max Sales Charge	—	—	11.87	9.72	4.22	—	10.48	—	—
F	2.51	18.91	18.91	12.34	5.91	—	11.57	0.79%	0.69%
I	2.49	18.68	18.68	12.15	5.71	—	11.43	0.91%	0.89%
R3	2.33	18.05	18.05	11.56	5.23	—	11.14	1.51%	1.41%
R4	2.44	18.07	18.07	11.82	5.47	—	11.23	1.21%	1.11%
R5	2.48	18.80	18.80	12.22	5.79	—	11.46	0.89%	0.81%
R6	2.56	18.98	18.98	12.37	5.92	—	11.59	0.80%	0.69%
Y	2.50	18.83	18.83	12.24	5.81	—	11.51	0.90%	0.79%
Benchmark	3.29	22.34	22.34	20.65	11.19	—	—	—	—
Morningstar Category	2.49	19.58	19.58	17.25	9.49	—	—	—	—

Morningstar® Category Global Large-Stock Blend

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.

Share Class Inception: A, I, R3, R4, R5, R6, Y - 2/29/16; F - 2/28/17. 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 2/29/16. 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: MSCI ACWI Index is a free float-adjusted market capitalization index that measures equity market performance in the global developed and emerging markets, consisting of developed and emerging market country indices. MSCI index performance is shown net of dividend withholding tax. Indices are unmanaged and not available for direct investment.

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¹Expenses are from the Fund's most recent prospectus at the time of publication. Gross expenses do not reflect contractual expense reimbursement arrangements. Net expenses reflect such arrangements in instances when they reduce gross expenses. These arrangements remain in effect until 2/28/26 unless the Fund's Board of Directors approves an earlier termination. Without these arrangements, performance would have been lower.

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 performance depends on the ability of the investment manager in selecting, overseeing, and allocating Fund assets to the sub-advisers. The sub-advisers' investment styles may not be complementary. • Small- and mid-cap securities can have greater risks and volatility than large-cap securities. • The securities of large market capitalization companies may underperform other segments of the 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. These risks may be greater, and include additional risks, for investments in emerging markets or if the Fund focuses in a particular geographic region or country. • There are risks of focusing investments in securities of companies in the utilities and industrials sectors which may cause the Fund's performance to be sensitive to developments in those sectors. • The Fund's climate focus may result in foregoing certain investments and underperformance comparative to funds that do not have a similar focus. Certain climate-focused investments may be dependent on government policies and subsidies. • The Fund may have high portfolio turnover, which could increase its transaction costs and an investor's tax liability.

Diversification does not ensure a profit or protect against loss in a declining market.

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.

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