

JEFFREY SCHWARTZ, CFA



Jeffrey Schwartz is a vice president and portfolio manager at Loomis, Sayles & Company, where he co-manages the Loomis Sayles Small Cap Value Fund, and the Loomis Sayles Small Cap Value and Small/Mid Cap Core strategies. In addition to his portfolio management responsibilities, he also maintains primary research coverage for the utilities sector and the transportation industry. Jeff joined Loomis Sayles from Palisade Capital Management in Fort Lee, NJ, where he was senior portfolio manager of a small cap strategy from late 2004 until 2012. Prior to Palisade, Jeff managed a small cap fund at Safeco Asset Management in Seattle, WA from 2003 until 2004. From 1992 until 2001, he was a senior portfolio manager and principal at Munder Capital Management in Birmingham, Michigan, most recently co-managing their microcap and small cap portfolios. Jeff earned a BA in mathematics from the State University of New York at Binghamton and an MBA from the University of Michigan.

Before investing, consider the fund's investment objectives, risks, charges, and expenses. Please visit loomissayles.com or call (800) 225-5478 for a prospectus and a summary prospectus, if available, containing this and other information. Read it carefully.

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