THINK BROADLY.
ACT DECISIVELY.

LOOMIS | SAYLES

COMPLEX CHALLENGES. INNOVATIVE SOLUTIONS.

TODAY'S COMPLEX, EVER-EVOLVING MARKETS CALL FOR AN INVESTMENT PARTNER WITH THE RESOURCES AND VISION TO LOOK AT THE INTERWOVEN GLOBAL LANDSCAPE WITH A FRESH PERSPECTIVE.

Delivering sustainable alpha demands the ability to understand and synthesise a wealth of global analytical inputs, then act on them with confidence to make informed investment decisions.

At Loomis Sayles, we have the proprietary resources, diverse expertise and collaborative process necessary to deliver a wide array of traditional and alternative investments tailored to the needs of institutional and retail investors. We have the global perspective, and the fundamental quantitative research and analysis skills, to support intelligent, judicious investment decisions. And we've woven this expertise into the fabric of the way we work.

What sets Loomis Sayles apart is the way our teams of portfolio managers, research analysts and traders are structured to collaborate with each other to cultivate our best investment ideas. The way we look far and wide for value in broad and narrow markets in an effort to deliver attractive returns. And the way we identify, evaluate and strategically embrace risk to pursue investment opportunities no matter where they lie – within traditional asset classes or among a growing range of alternative investment strategies.

Loomis Sayles applies a broad, deep perspective, so our dedicated teams of accountable portfolio managers can act decisively to deliver innovative client-focused solutions built on a foundation of integrated global research.

Within this complex landscape, we harness the collective power of all our resources to act decisively. This allows us to take the steps that help create sustainable returns for our clients.

RICH RESOURCES.
EXPANSIVE RESEARCH.

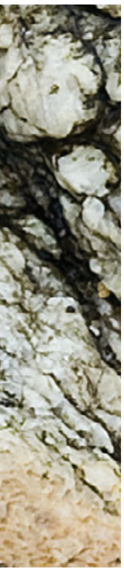
THERE IS NO SHORTAGE OF INVESTMENT FIRMS VYING TO EARN YOUR TRUST AND CONFIDENCE – PARTICULARLY WHEN MARKET CHALLENGES CALL INTO QUESTION RETURN EXPECTATIONS.

Loomis Sayles has the comprehensive, multifaceted resources we need to stand firm in the face of volatility. Proprietary research lies at the heart of every product team's investment process, and more than half of Loomis Sayles professionals are dedicated to this critical dimension of investment management.

What helps define us? We offer broad global, macroeconomic perspectives, coupled with deep security-specific analysis. Our investment decisions are informed by insights drawn from bottom-up equity and fixed income research, framed by our assessment of the macro environment, and complemented by quantitative research expertise.

Loomis Sayles analysts are career professionals who offer deep knowledge and experience in a diversity of global asset classes and market sectors. These dedicated experts provide the market and issuer-specific insight essential to supporting our portfolio management teams across a wide range of investment strategies.

Independent, in-house research is the bedrock beneath every strategy we offer. We bring together a top-down macro focus with bottom-up security specific research to unearth compelling values and hidden gems that might otherwise be overlooked.



A Global Perspective.

As globalisation accelerates, a deep understanding of world markets, history and trends is vital to executing investment ideas. Loomis Sayles conducts independent top-down global macro strategy and economic research that provides valuable context for our investment teams. These insights are integrated closely with proprietary equity and fixed income analysis undertaken on a global basis to help develop investment ideas and portfolio strategies.

Research: The Foundation of Innovation.

Our research teams generate new ideas through continuous interaction, discussion and sharing of insights.

Macro Strategies

Sovereign Research

Credit Research

Mortgage and Structured Finance Research

Quantitative Research and Risk Analysis

Equity Research

INTELLIGENT RISK.
INFINITE OPPORTUNITY.

OUR MISSION, FIRST AND FOREMOST, IS TO BE A WORLD-CLASS INVESTMENT MANAGEMENT FIRM THAT DELIVERS SUPERIOR, RISK-ADJUSTED PERFORMANCE TO OUR CLIENTS.

While some may view risk management primarily as a way of constraining investment decisions, Loomis Sayles embraces it. We take a practical, real-world approach, viewing intelligent risk as untapped opportunity by embedding risk analysis directly into the portfolio management process – every step of the way.

We understand that achieving superior performance while managing risk requires insight, not just oversight. To that end, we employ dozens of sophisticated metrics customized to the needs of each investment team.
We view the world through the lens of our portfolio managers to pinpoint the potential risks and rewards of an expansive range of scenarios. Because the best portfolios are constructed not only on what we expect will happen, but what could happen.

At Loomis Sayles, we work as partners to apply our risk management expertise, sophisticated analytics and advanced technology to make disciplined, intelligent decisions. This opens the door to a multitude of opportunities for our clients.

Our goal is to enhance our clients' portfolios by pursuing exceptional investment opportunities that create consistent patterns of strong, risk-adjusted returns. At Loomis Sayles, we combine deep fundamental analysis, quantitative research and collaborative decision-making process to thoroughly assess risk before we make decisions.

We believe the best protection against risk is knowledge.

Fueled by Technology.

Loomis Sayles taps the power of its proprietary In2! technology platform to integrate more than 22 million data points each day. This includes security, portfolio and market-index-level characteristics, forecasts, analytics, risk metrics, prices, trades and returns, as well as other proprietary research and data. Using highly advanced tools and technology, we harness this data to provide our portfolio management teams with an additional window into the fast-paced global environment. It is all delivered in a way that allows them to translate data into the insight needed to manage risk and make informed decisions with conviction.

In2!

MANY TEAMS.
ONE PURPOSE.

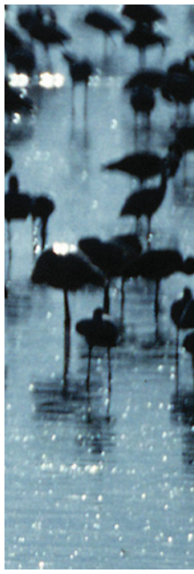
A FUNDAMENTAL WISDOM OF INVESTMENT MANAGEMENT IS THAT NO ONE HAS ALL THE ANSWERS – ESPECIALLY GIVEN THE BREADTH AND INCREASING COMPLEXITY OF THE GLOBAL INVESTMENT ENVIRONMENT.

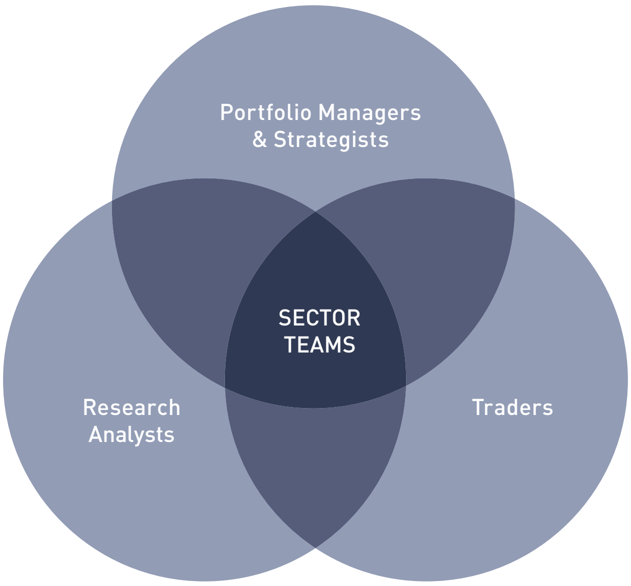
At Loomis Sayles, no idea is developed in isolation. We support 14 sector and macro teams comprised of portfolio managers, research analysts and traders who work together to stimulate thoughtful discussions, explore ideas, offer insights and identify opportunities in an effort to generate strong returns.

Fueled by in-depth research, these talented professionals pool their knowledge and experience to assess markets and help identify their best investment values among an ever-expanding array of global equity, fixed income, currency, commodity, derivative and other markets. This collaborative insight supports the decision-making of our small, accountable portfolio management teams, reinforcing their objective of producing sustainable performance.

Our collaborative culture also extends to the way we work with clients. We proactively engage with clients to gain a clear understanding of their goals and objectives, and then partner with them to deliver compelling solutions.

At Loomis Sayles, we are all on the same team – yours.





Loomis Sayles professionals have honed their skills with discipline and precision so we can look to deliver the best performance possible. We offer you this diverse expertise in areas such as equity and fixed income research, the derivative markets, macroeconomics, quantitative research and asset allocation.

OUR MISSION.
YOUR SUCCESS.

WHEN YOU CHOOSE LOOMIS SAYLES AS YOUR INVESTMENT PARTNER, YOU ARE PUTTING YOUR TRUST IN A FIRM THAT HAS NAVIGATED CHALLENGING FINANCIAL MARKETS SINCE 1926.

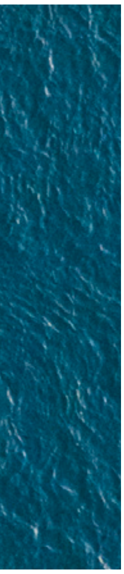
Throughout a history shaped by world events, seismographic shifts in the economy, and undulating peaks and valleys of market cycles, Loomis Sayles has remained committed to producing consistent, competitive returns for our clients.

Our passion for performance and an unwavering commitment to our clients is marked by:

Consistency. Reliable performance is facilitated by stable leadership at both the corporate and portfolio management levels, coupled with a disciplined investment process designed to optimize opportunity and manage risk.

Transparency. At Loomis Sayles, we want to ensure you have a clear understanding of the why, what and how behind all of our investment strategies.

Our investment decisions are a product of a collaborative decision-making process, built on the foundation of consistency, integrity, transparency and a passionate commitment to doing the right thing for our clients. Our mission is to achieve your goals – together.



Integrity. Loomis Sayles is committed to the core – to putting our clients' interests first and acting with integrity, regardless of what the markets might bring.

Loomis Sayles has the rich resources, diverse investment expertise and collaborative decision-making processes to think broadly and act decisively. Because that is what we believe it takes to deliver alpha – now and in the future.

Loomis Sayles at a Glance

FOUNDED 1926

CLIENT TYPES

Public Funds
Unions
Corporate Plans
Insurance Companies
Charities, Foundations and Endowments
Financial Advisors
Individual Investors
Sub-Advisory Mandates
Sovereign Wealth Funds

VEHICLES

Mutual Funds
Institutional Separate Accounts
Exchange Traded Funds
Managed Accounts
Hedge Funds
Collective Trusts
Other Private Placements

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