

## LOOMIS SAYLES ANNOUNCES CHANGES TO MUNICIPAL BOND INVESTMENT AND RESEARCH PLATFORM

**BOSTON (15 SEPTEMBER 2021)** – Loomis, Sayles & Company, an affiliate of Natixis Investment Managers, today announced changes aimed at enhancing its municipal bond investment and research platform. These changes are designed to support the development and delivery of competitive municipal bond investment strategies that can meet client needs and market demand. Loomis Sayles currently manages approximately \$8.6 billion in municipal bond assets firmwide.

Effective 30 September 2021, the following changes will be implemented:

- Pramila Agrawal and Jim LeBuhn will join Dawn Mangerson as portfolio managers on all municipal bond institutional and retail strategies including the team’s flagship Intermediate Municipal Bond Fund and managed accounts. The municipal bond investment team will report to Pramila, who currently focuses on managing portfolios for income-oriented, tax-aware investors utilizing the broad opportunity set offered in the credit markets.
- Jim Grabovac and Larry Jones will come off the municipal bond portfolio management team but will continue to play significant roles in contributing to alpha generation within municipal bond portfolios. Jim will retain his role as a municipal bond strategist and Larry will join Brian Fahrman on the municipal bond trading desk.
- Agnes Choi and John Ward will become portfolio specialists.
- Kelly Cruse, a member of the municipal research team for more than 10 years, has been promoted to head of municipal bond research, reporting to Chris Gootkind, director of credit research. In this new role, she will oversee all municipal bond analysts, including senior fixed income analysts Derek Endsley and Bedford Lydon, fixed income analyst Ryan Friend and research associate Joe Prestamer.
- Finally, Brad Mincke, who has been a member of the municipal bond research team for over a decade, will retire at year-end. We wish Brad the best and thank him for his service to Loomis Sayles.

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### ABOUT LOOMIS SAYLES

Since 1926, Loomis, Sayles & Company has helped fulfill the investment needs of institutional and mutual fund clients worldwide. The firm’s performance-driven investors integrate deep proprietary research and integrated risk analysis to make informed, judicious decisions. Teams of portfolio managers, strategists, research analysts and traders collaborate to assess market sectors and identify investment opportunities wherever they may lie, within traditional asset classes or among a range of alternative investments. Loomis Sayles has the resources, foresight and the flexibility to look far and wide for value in broad and narrow markets in its commitment to deliver attractive sustainable returns for clients. This rich tradition has earned Loomis Sayles the trust and respect of clients worldwide, for whom it manages \$357.7 billion\*\* in assets (as of 30 June 2021).

*\*\*Includes the assets of Loomis, Sayles & Co., LP, and Loomis Sayles Trust Company, LLC. Loomis Sayles Trust Company is a wholly owned subsidiary of Loomis, Sayles & Company, LP.*

## ABOUT NATIXIS INVESTMENT MANAGERS

Natixis Investment Managers' multi-affiliate approach connects clients to the independent thinking and focused expertise of more than 20 active managers. Ranked among the world's largest asset managers<sup>1</sup> with more than \$1.4 trillion assets under management<sup>2</sup> (€1,182.5 billion), Natixis Investment Managers delivers a diverse range of solutions across asset classes, styles, and vehicles. The firm is dedicated to advancing sustainable finance and developing innovative Environmental, Social, and Governance (ESG) products. Natixis Investment Managers consults and partners with its clients and offers insight on markets and assumptions to better align strategies with long-term goals.

Headquartered in Paris and Boston, Natixis Investment Managers is wholly-owned by Natixis. Natixis is a subsidiary of BPCE, the second-largest banking group in France. Natixis Investment Managers' affiliated investment management firms include AEW; Alliance Entreprendre; AlphaSimplex Group; DNCA Investments;<sup>3</sup> Dorval Asset Management; Flexstone Partners; Gateway Investment Advisers; Harris Associates; Investors Mutual Limited; Loomis, Sayles & Company; Mirova; MV Credit; Naxicap Partners; Ossiam; Ostrum Asset Management; Seeyond; Seventure Partners; Thematics Asset Management; Vauban Infrastructure Partners; Vaughan Nelson Investment Management; and WCM Investment Management. Additionally, investment solutions are offered through Natixis Investment Managers Solutions and Natixis Advisors, LLC. **Not all offerings available in all jurisdictions.** For additional information, please visit Natixis Investment Managers' website at [im.natixis.com](https://im.natixis.com) | LinkedIn: [linkedin.com/company/natixis-investment-managers](https://linkedin.com/company/natixis-investment-managers).

Natixis Investment Managers' distribution and service groups include Natixis Distribution, LLC, a limited purpose broker-dealer and the distributor of various U.S. registered investment companies for which advisory services are provided by affiliated firms of Natixis Investment Managers, Natixis Investment Managers S.A. (Luxembourg), Natixis Investment Managers International (France), and their affiliated distribution and service entities in Europe and Asia.

<sup>1</sup>Cerulli Quantitative Update: Global Markets 2021 ranked Natixis Investment Managers as the 15th largest asset manager in the world based on assets under management as of 31 December 2020.

<sup>2</sup>Assets under management ("AUM") as of 30 June 2021 is \$1,402.5 billion. AUM, as reported, may include notional assets, assets serviced, gross assets, assets of minority-owned affiliated entities and other types of non-regulatory AUM managed or serviced by firms affiliated with Natixis Investment Manager. Excluding H2O Asset Management.

<sup>3</sup>A brand of DNCA Finance.



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