

## DAN FUSS WINS OUTSTANDING PORTFOLIO MANAGER AT THE 2019 U.S. MORNINGSTAR AWARDS FOR INVESTING EXCELLENCE

- Fixed income pioneer recognized for long-term track record
- Fuss cited for advancing the next generation of fixed income investors at Loomis Sayles

**CHICAGO (MAY 9, 2019)** – Loomis, Sayles & Company, an affiliate of Natixis Investment Managers, is pleased to announce that Dan Fuss has been named Outstanding Portfolio Manager at the 2019 U.S. Morningstar Awards for Investing Excellence.

Morningstar has granted annual awards to accomplished portfolio managers since 1988. The awards recognize portfolio managers, asset management firms, and up-and-coming managers who demonstrate excellent investment skill, the courage to differ from the consensus to benefit investors, and an alignment of interests with the strategies' investors. The Morningstar Awards for Investing Excellence winners are chosen based on research and in-depth qualitative evaluation by Morningstar's manager research group. Methodology for the awards is [available here](#).

“Dan Fuss pioneered the benchmark-agnostic, multisector approach to fixed-income that has defined the firm's flagship Loomis Sayles Bond (LSBDX) since 1991. During his tenure at Loomis Sayles, he's demonstrated a value-driven, often contrarian, and aggressive strategy that's contributed to an impressive long-term record for the fund and its siblings,” said Alfonzo Bruno, Manager Research Analyst at Morningstar. “Fuss also deserves credit for working with firm CIO Jae Park to codify the firm's fixed-income investment process and to develop the next generation of bond investors at Loomis Sayles.”

“We are honored that Morningstar has selected Dan as this year's Outstanding Portfolio Manager. He's a true investment icon, but an even better individual,” said Kevin Charleston, chief executive officer of Loomis Sayles. “Since joining Loomis Sayles over 40 years ago, Dan's intellectual curiosity, investment excellence, humility and unparalleled commitment to clients have shaped the ethos of our organization. As the maverick of multisector investing, he has built an impressive team with a suite of products all managed with a consistent investment philosophy and a flexible, long-term, benchmark-agnostic, value-driven approach.”

Dan Fuss has 61 years of experience in the investment industry and has been with Loomis, Sayles & Company since 1976. He is vice chairman of the firm's Board of Directors and co-manages the firm's flagship Loomis Sayles Bond Fund—which won the 2009 Morningstar Fund Manager of the Year award in the fixed-income category—in addition to the Loomis Sayles Investment Grade Fixed Income, Strategic Income, Fixed Income, Institutional High Income and Global Allocation funds. In 2012, Dan received both the Institutional Investor Money Management Lifetime Achievement Award, and the Lipper Excellence in Investing Award. In 2013, Dan received the CFA Society of Milwaukee Lifetime Achievement Award. In 2000, he was named to the Fixed Income Analysts Society's Hall of Fame in recognition of his contributions and lifetime achievements toward the advancement of the analysis of fixed income securities and portfolios. He has twice been president of CFA Society Boston. Dan earned a BS and an MBA from Marquette University. He served in the US Navy from 1955 to 1958 and held the rank of Lieutenant.

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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 \$263.5 billion\*\* in assets (as of March 31, 2019).

*\*Total strategy assets include all assets managed by the respective team.*

*\*\*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 serves financial professionals with more insightful ways to construct portfolios. Powered by the expertise of more than 20 specialized investment managers globally, we apply Active Thinking<sup>®</sup> to deliver proactive solutions that help clients pursue better outcomes in all markets. Natixis ranks among the world's largest asset management firms<sup>1</sup> (\$917.1 billion/€802.1 billion AUM<sup>2</sup>).

Natixis Investment Managers includes all of the investment management and distribution entities affiliated with Natixis Distribution, L.P. and Natixis Investment Managers S.A. **Not all offerings available in all jurisdictions.**

<sup>1</sup>*Cerulli Quantitative Update: Global Markets 2018 ranked Natixis Investment Managers as the 16th largest asset manager in the world based on assets under management as of December 31, 2017.*

<sup>2</sup>*Net asset value as of December 31, 2018. Assets under management ("AUM"), as reported, may include notional assets, assets serviced, gross assets and other types of non-regulatory AUM. AUM does not include Vega Investment Managers, which was transferred to Natixis Wealth Management in December 2018.*

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

**Natixis Distribution, L.P. (fund distributor, member FINRA | SIPC) and Loomis, Sayles & Company L.P. are affiliated.**

## ABOUT THE OUTSTANDING PORTFOLIO MANAGER AWARD

*Each year, Morningstar recognizes an Outstanding Portfolio Manager, an individual who has produced exceptional returns over the long term. Morningstar's manager research analysts conduct in-depth qualitative analyses in order to select nominees and, subsequently, vote to determine the award winner. To qualify for the award, the manager's strategy must currently earn a Morningstar<sup>®</sup> Analyst Rating<sup>™</sup> of: Gold, which is a best-of-breed managed portfolio that distinguishes itself across the pillars—such as people, process, parent, performance, and price—and has garnered the analysts' highest level of conviction; or Silver, which is an offering with advantages that outweigh the disadvantages across the pillars and with sufficient level of analyst conviction to warrant a positive rating.*

*To be eligible for the Outstanding Portfolio Manager award, managers must run investment strategies that are under Morningstar manager research analyst coverage, which includes approximately 1,800 open-end mutual funds, exchange-traded funds, separately managed accounts, or collective investment trusts, and have received a Morningstar Analyst Rating™ of Gold or Silver over the past 12 months. Nominees for this award have delivered strong returns for investors over their careers.*

*Morningstar's Manager Research Group consists of various wholly owned subsidiaries of Morningstar, Inc. including, but not limited to, Morningstar Research Services LLC. Analyst Ratings are subjective in nature and should not be used as the sole basis for investment decisions. Analyst Ratings are based on Morningstar's Manager Research Group's current expectations about future events and therefore involve unknown risks and uncertainties that may cause such expectations not to occur or to differ significantly from what was expected. Analyst Ratings are not guarantees nor should they be viewed as an assessment of a fund's or a fund's or separately managed account's underlying securities' creditworthiness. This press release is for informational purposes only; references to securities or a separately managed account investment strategy in this press release should not be considered an offer or solicitation by Morningstar to buy or sell those funds.*

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