



## LOOMIS SAYLES GLOBAL GROWTH STRATEGY CELEBRATES KEY 3-YEAR MILESTONE, FUND GRANTED 5-STAR RATING BY MORNINGSTAR

- Managed by Aziz V. Hamzaogullari, founder of the Loomis Sayles Growth Equity Strategies team
- Differentiated process with differentiated results; strong historical risk-adjusted returns

*Morningstar 5-Star Rating: 3-Year and overall out of 901 funds. US Fund World Large Stock Category (Class Y). Overall rating derived from weighted average of the 3-, 5- and 10-year (if applicable) Morningstar Rating metrics; other ratings based on risk-adjusted returns, as of March 31, 2020.*

**BOSTON (May 23, 2019)** – Loomis, Sayles & Company, an affiliate of Natixis Investment Managers, today recognized the 3-year anniversary of the Loomis Sayles Global Growth strategy and its associated fund, the Loomis Sayles Global Growth Fund (LSGGX), which was recently assigned a 5-star rating from Morningstar.

This Loomis Sayles Global Growth strategy has \$908.7 million in assets under management, including the highly-rated Loomis Sayles Global Growth Fund<sup>1</sup>. Since the Fund was launched in 2016, it has outperformed the benchmark by 4.80% on a net annualized basis and ranks in the 5<sup>th</sup> percentile among its peers.<sup>2</sup>

*Morningstar Percentile Rankings<sup>2</sup> for the US Fund World Large Stock category as of 3/31/19. One year: 5th percentile (48/900), Three Year: 5th percentile (31/732).*

The Global Growth strategy is managed by Aziz V. Hamzaogullari, the chief investment officer and founder of the Loomis Sayles Growth Equity Strategies (GES) team, which has \$56 billion in assets under management.<sup>3</sup> The GES team manages a suite of equity products that employs a singular and differentiated investment process to generate both US and non-US investment ideas. The GES team takes a long-term, private equity approach to investing. Through a proprietary, bottom-up research framework, they look to invest in those few high-quality businesses with sustainable competitive advantages and profitable growth when they trade at a discount to intrinsic value.

The Global Growth strategy is a natural extension given the global nature of the GES team's research-intensive alpha engine. The team believes the qualities that make a business great are universal in nature. For example, the team's global profit pool analysis, a component of its process since 2006, yields insights regarding long-term structural winners regardless of country of domicile. The strategy is characterized by low turnover, high active share and a high conviction portfolio of 30-45 holdings with low factor risk exposure.

"A truly differentiated investment process underlies our GES portfolios, demonstrated by a research-intensive alpha engine that drives both US and non-US idea generation," said Jae Park, chief investment

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<sup>1</sup> As of April 30, 2019.

<sup>2</sup> The total return percentile rank for the specified time period is relative to all funds that have the same Morningstar category. The highest (or most favorable) percentile rank is 1, and the lowest (or least favorable) percentile rank is 100. Rankings are subject to change monthly. Morningstar rankings do not include the effect of sales charges.

<sup>3</sup> As of April 30, 2019.

Performance data shown represents past performance and is no guarantee of, and not necessarily indicative of, future results. Total return and value will vary and you may have a gain or loss when shares are sold. Current performance may be lower or higher than quoted. For most recent month-end performance, visit [www.loomissayles.com](http://www.loomissayles.com).

officer of Loomis Sayles. "We are so pleased to see the Global Growth strategy reach the 3-year milestone and look forward to continued consistent results."

## BIOGRAPHICAL INFORMATION:

### AZIZ V. HAMZAOGULLARI, CFA

Aziz Hamzaogullari is the chief investment officer and founder of the Growth Equity Strategies Team at Loomis, Sayles & Company. He is the portfolio manager of the Loomis Sayles large cap, global and all cap growth strategies, including the Loomis Sayles Growth and Global Growth mutual funds and products outside the US. Aziz is also an executive vice president and a member of the firm's Board of Directors. He joined Loomis Sayles in 2010 from Evergreen Investments where he was a senior portfolio manager and managing director. Aziz joined Evergreen in 2001, was promoted to director of research in 2003 and portfolio manager in 2006. He was head of Evergreen's Berkeley Street Growth Equity team and was the founder of the research and investment process. Prior to Evergreen, Aziz was a senior equity analyst and portfolio manager at Manning & Napier Advisors. He has 25 years of investment industry experience. Aziz earned a BS from Bilkent University, Turkey, and an MBA from George Washington University. He is also a member of CFA Society Boston.

### PERFORMANCE AS OF MARCH 31, 2019 (%)

	CUMULATIVE RETURN			AVERAGE ANNUALIZED RETURN			
	3-MONTH	YTD	1-YEAR	3-YEAR	5-YEAR	SINCE INCEPTION	
CLASS Y	17.84	17.84	9.69	15.47	-	15.47	
BENCHMARK	12.18	12.18	2.60	10.67	-	10.67	

### CALENDAR YEAR PERFORMANCE (%)

	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
CLASS Y	-6.71	32.00	-	-	-	-	-	-	-	-
BENCHMARK	-9.41	23.97	-	-	-	-	-	-	-	-

*Gross expense ratio 1.32%. Net expense ratio 1.05%. As of the most recent prospectus, the investment advisor has contractually agreed to waive fees and/or reimburse expenses (with certain exceptions) once the expense cap of the fund has been exceeded. This arrangement is set to expire on 03/31/2020. When an expense cap has not been exceeded, the gross and net expense ratios and/or yields may be the same.*

*As of March 31, 2019.*

### PERFORMANCE AS OF MARCH 31, 2020 (%)

	CUMULATIVE RETURN			AVERAGE ANNUALIZED RETURN			
	3-MONTH	YTD	1-YEAR	3-YEAR	5-YEAR	SINCE INCEPTION	
CLASS Y	-14.45	-14.45	-5.20	8.14	-	9.91	
BENCHMARK	-21.36	-21.36	-11.25	1.50	-	4.73	

### CALENDAR YEAR PERFORMANCE (%)

	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
CLASS Y	30.58	-6.71	32.00	-	-	-	-	-	-	-
BENCHMARK	26.60	-9.41	23.97	-	-	-	-	-	-	-

*Gross expense ratio 1.23%. Net expense ratio 1.00%. As of the most recent prospectus, the investment advisor has contractually agreed to waive fees and/or reimburse expenses (with certain exceptions) once the expense cap of the fund has been exceeded. This arrangement is set to expire on 03/31/2021. When an expense cap has not been exceeded, the gross and net expense ratios and/or yields may be the same.*

*As of March 31, 2020.*

Performance data shown represents past performance and is no guarantee of, and not necessarily indicative of, future results. Total return and value will vary and you may have a gain or loss when shares are sold. Current performance may be lower or higher than quoted. For most recent month-end performance, visit [www.loomissayles.com](http://www.loomissayles.com)

**THE GROWTH EQUITY STRATEGIES TEAM MANAGES THE FOLLOWING INVESTMENT STRATEGIES:**  
**INSTITUTIONAL STRATEGIES**

Loomis Sayles Global Growth  
Loomis Sayles Large Cap Growth  
Loomis Sayles All Cap Growth

**MUTUAL FUNDS**  
Loomis Sayles Global Growth Fund  
Loomis Sayles Growth Fund  
Natixis US Equity Opportunities Fund\*

*\*Arziz Hamzaogullari is one of multiple managers on the Natixis US Equity Opportunities Fund, he shares responsibilities with managers from other Natixis affiliates.*

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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® 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. Services/ products are not available to all investors 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.*

For each fund with at least a three-year history, Morningstar calculates a Morningstar Rating™ used to rank the fund against other funds in the same category. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a fund's monthly excess performance, without any adjustments for loads (front-end, deferred, or redemption fees), placing more emphasis on downward variations and rewarding consistent performance. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. The top 10% of funds in each category receive 5 stars, the next 22.5%

receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars and the bottom 10% receive 1 star (each share class is counted as a fraction of one fund within this scale and rated separately, which may cause slight variations in the distribution percentages). Past performance is no guarantee of future results.

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Y shares are only available to certain institutional investors with a minimum initial investment of \$100,000.

**Alpha:** A measure of the difference between a portfolio's actual returns and its expected performance, given its level of systematic market risk. A positive alpha indicates outperformance and negative alpha indicates underperformance relative to the portfolio's level of systematic risk.

**Equity securities** are volatile and can decline significantly in response to broad market and economic conditions. **Foreign and emerging market securities** may be subject to greater political, economic, environmental, credit, currency and information risks. Foreign securities may be subject to higher volatility than US securities, due to varying degrees of regulation and limited liquidity. These risks are magnified in emerging markets. **Currency** exchange rates between the US dollar and foreign currencies may cause the value of the Fund's investments to decline. **Investments in small and midsize companies** can be more volatile than those of larger companies. **Growth stocks** may be more sensitive to market conditions than other equities, as their prices strongly reflect future expectations.

Before investing, consider the fund's investment objectives, risks, charges, and expenses. Visit [im.natixis.com](http://im.natixis.com) or call 800-225-5478 for a prospectus or a summary prospectus 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.

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