

## **LOOMIS SAYLES GLOBAL ALLOCATION STRATEGY MARKS 25<sup>TH</sup> ANNIVERSARY OF LAUNCH, CONTINUES TO PROVIDE STRONG RETURNS TO INVESTORS**

**BOSTON (9 JULY 2021)** – Loomis, Sayles & Company, an affiliate of Natixis Investment Managers, celebrates the 25<sup>th</sup> anniversary of the Loomis Sayles Global Allocation strategy with a [new video that dives](#) into the investment team’s “best ideas” approach behind the investment strategy. The strategy currently has \$7.9 billion in assets under management (as of 31 March 2021) and seeks to generate equity-like returns with less volatility.

### **[WATCH: Global Allocation: Our Best Ideas Across the Capital Structure](#)**

Launched on 1 May 1996, the Loomis Sayles Global Allocation strategy has an unconstrained, flexible mandate that leverages Loomis Sayles’ deep global equity and fixed income resources. It offers global diversification across major asset classes and markets, which has historically helped reduce portfolio risk without compromising long-term absolute return. The fund is managed by four tenured Loomis Sayles portfolio managers; around 70% of the strategy is typically in global equity which is overseen by Eileen Riley and Lee Rosenbaum, while fixed income management is provided by Matt Eagan and David Rolley.

“For the past 25 years, Loomis Sayles’ Global Allocation strategy has served investors with a global diversified portfolio of best ideas,” said David Waldman, chief investment officer of Loomis Sayles. “By leveraging Loomis Sayles’ world class expertise in both global equity and fixed income, we are able to provide a differentiated investment strategy to our clients that has stood the test of time.”

The Loomis Sayles Global Allocation strategy has an unconstrained, selective approach and uses bottom-up analysis across all geographies and sectors to find quality businesses that benefit from two market inefficiencies: mispricing and duration effect (the value a company generates through the compounding of its free cash flow). The fundamental equity research focuses on three alpha drivers: quality, intrinsic value growth and valuation. Together, these alpha drivers guide the team to invest in companies that offer sustainable, long-term outperformance potential. The strategy also takes an opportunistic, value-driven approach to fixed income that can provide exposure to corporate, emerging market or high-yield debt securities, seeking to create an additional engine for outperformance.

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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 \$345.7 billion \*\* in assets (as of 31 March 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 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 Investment Managers ranks among the world's largest asset management firms<sup>1</sup> with more than \$1.3 trillion assets under management<sup>2</sup> (€1,152.8 billion). Headquartered in Paris and Boston, Natixis Investment Managers is a subsidiary of Natixis. Listed on the Paris Stock Exchange, 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; Vega Investment Managers;<sup>4</sup> and WCM Investment Management. Additionally, investment solutions are offered through Natixis Investment Managers Solutions, and Natixis Advisors offers other investment services through its AIA and MPA division. **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, L.P., 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 2020 ranked Natixis Investment Managers as the 17th largest asset manager in the world based on assets under management as of 31 December 2019.

<sup>2</sup> Assets under management ("AUM") as of 31 March 2021 is \$1,354.8 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 Managers. Excluding H2O Asset Management.

<sup>3</sup> A brand of DNCA Finance.<sup>4</sup> A wholly-owned subsidiary of Natixis Wealth Management.



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