

Joseph R. Gatz, CFA



Joe Gatz is a vice president of Loomis, Sayles & Company and portfolio manager for the Loomis Sayles equity group. He co-manages the Loomis Sayles Small Cap Value Fund and the Loomis Sayles Small/Mid Cap and Small Cap Value strategies. In addition to his portfolio management responsibilities, Joe also maintains primary research coverage for the information technology sector and the media industry. He joined Loomis Sayles in 1999 as a mid cap value equity portfolio manager, and was promoted to lead the small/extended/mid cap value team in early 2000. Prior to Loomis Sayles, Joe was a portfolio manager at Banc One Investment Advisors. He started his investment industry career at National Bank of Detroit (NBD). Joe earned a BA from Michigan State University and an MBA from Indiana University.

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

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