

LOOMIS SAYLES REOPENS SMALL CAP GROWTH STRATEGY AS PRODUCT ACHIEVES 20-YEAR ANNIVERSARY MILESTONE

BOSTON (21 MAY 2025) – Loomis, Sayles & Company celebrates the twenty-year anniversary of the Loomis Sayles Small Cap Growth strategy, co-managed by Mark Burns and John Slavik since its 1 April 2005 inception.

The Specialty Growth Strategy (SGS) Team has \$5.5 billion in total assets under management as of 31 March 2025 across three products: Small Cap Growth, Small/Mid Cap Growth, and Mid Cap Growth. Following a successful soft close of the Small Cap Growth strategy at the end of 2019, the strategy has been re-opened across all institutional channels.

The SGS Team's investment philosophy is that wealth is created by the power of compounding of consistent returns. Their process takes a lower volatility approach to investing in high secular growth companies that seeks to generate alpha and manage risk in inherently volatile asset classes, with the objective of consistent returns that can be compounded. Consistent with this philosophy, all three strategies seek to outperform respective indices over full market cycle on a risk-adjusted basis. The philosophy and process, which have been tested across multiple and often extreme market environments, have remained unchanged since inception.

"Mark and John have adhered to a disciplined investment process with great consistency over the past two decades," said David Waldman, chief investment officer of Loomis Sayles. "We are proud of the strong risk-adjusted returns they have generated for Small Cap Growth strategy investors and we are pleased that it is once again available for investment."

Within the Small Cap Growth universe (as defined by eVestment Alliance), less than half of all strategies in existence 20 years ago are still active today. Out of these active Small Cap Growth strategies, only 15 have retained identical portfolio management teams since 1 April 2005, representing less than 15% of all active Small Cap Growth strategies currently in existence. Loomis Sayles Small Cap Growth is one of those strategies.

Learn more about the Loomis Sayles Small Cap Growth strategy [here](#).

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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 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, risk-adjusted returns for clients. This rich tradition has earned Loomis Sayles the trust and respect of clients worldwide, for whom it manages \$390.1 billion* in assets (as of 31 March 2025).

**Includes the assets of both Loomis, Sayles & Co., LP, and Loomis Sayles Trust Company, LLC. (\$33.9 billion for the Loomis Sayles Trust Company). Loomis Sayles Trust Company is a wholly owned subsidiary of Loomis, Sayles & Company, L.P.*