

JOSEPH R. GATZ, CFA



Joe Gatz is a portfolio manager at Loomis, Sayles & Company, where he co-manages the Loomis Sayles Small Cap Value Fund, and the Loomis Sayles Small Cap Value and Small/Mid Cap Core strategies. In addition to his portfolio management responsibilities, Joe also maintains primary research coverage for several holdings within both strategies, with an emphasis on special situations, as well as industrials, healthcare and energy. 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. He is a CFA® charterholder.

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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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