

LOOMIS SAYLES GLOBAL ALLOCATION STRATEGY CELEBRATES 30TH ANNIVERSARY

- Multi-asset strategy leverages the firm's legacy of research-driven investing and takes a best-ideas approach to seeking equity-like returns with less volatility across the capital structure

BOSTON (13 MAY 2026) – Loomis, Sayles & Company, the century-old investment manager with nearly \$418 billion in assets under management, marks the 30-year anniversary of its Global Allocation strategy, one of the firm's longest-running multi-asset offerings. Launched in 1996, the strategy reflects Loomis Sayles' long-standing belief that rigorous fundamental research and active security selection are central to effective capital allocation across market cycles.

The Global Allocation strategy seeks to deliver equity-like returns with lower volatility over a full market cycle by allocating capital across global equities, US fixed income and non-US fixed income. The strategy is managed by a seasoned investment team drawing on Loomis Sayles' global research platform and proprietary risk tools. The Global Allocation strategy is led by portfolio managers Matt Eagan, CFA; Eileen Riley, CFA; David Rolley, CFA; and Lee Rosenbaum, whose combined experience across global equities, fixed income and multi-asset investing has helped shape the strategy's long-term, bottom-up orientation. As of 31 March 2026, the Global Allocation strategy had approximately \$7.1 billion in assets under management.

At the core of the investment process is fundamental research conducted by equity and fixed income teams. Global equities serve as a key engine of long-term return potential, with the portfolio focused on a concentrated set of best ideas supported by in-depth company analysis and clearly defined upside and downside scenarios. Fixed income plays a dual role in the strategy, seeking to generate alpha while also helping diversify overall portfolio risk through active security selection and top-down macro insights.

“Over the past thirty years, the Global Allocation investment team has demonstrated the value of staying grounded in fundamental research and disciplined security selection, particularly during periods of market stress,” said David Waldman, Chief Investment Officer of Loomis Sayles. “The team's ability to integrate equity and fixed income insights and let bottom-up opportunities drive asset allocation has been a defining strength of the strategy and remains central to how we invest on behalf of clients today.”

“When we launched Global Allocation in 1996, the goal was simple: give investors the freedom to follow their best ideas in pursuit of generating attractive long-term risk-adjusted returns for clients,” said Dan Fuss, CFA, Vice Chairman of Loomis Sayles and former portfolio manager on the Global Allocation strategy. “That commitment to fundamental research and a no-constraints approach has endured and it's what has allowed the strategy to evolve through decades of very different market environments.”



Loomis, Sayles & Company
One Hundred Years & Still Active

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ABOUT LOOMIS SAYLES

For a century, Loomis, Sayles & Company has built a legacy focused on fulfilling the investment needs of institutional and retail clients worldwide. To do this, our performance-driven investors aim to deliver long-term results by leveraging deep, independent research and rigorous risk analysis. With the resources, foresight, and flexibility to look far and wide for value in broad and narrow markets, Loomis Sayles has remained a trusted partner to its clients since 1926. Loomis Sayles proudly manages \$417.9 billion* in assets on behalf of clients worldwide (as of 31 March 2026).

**Includes the assets of both Loomis, Sayles & Co., LP, and Loomis Sayles Trust Company, LLC. (\$53.9 billion for the Loomis Sayles Trust Company). Loomis Sayles Trust Company is a wholly owned subsidiary of Loomis, Sayles & Company, L.P.*

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