

## LOOMIS SAYLES CELEBRATES ANNIVERSARIES OF GROWTH EQUITY STRATEGIES TEAM'S LARGE CAP GROWTH AND ALL CAP GROWTH OFFERINGS

*15 Years of Growth Equity Investing, One Differentiated Approach*

**80.7**

**BILLION IN ASSETS UNDER  
MANAGEMENT**  
GES Team  
As of 9/30/21

**136**

**COMBINED YEARS OF INVESTMENT  
EXPERIENCE**  
GES Team  
As of 9/30/21

**1**

**INVESTMENT PHILOSOPHY**  
Supported by a seven-step research  
framework

**BOSTON (18 NOVEMBER 2021)** – Loomis, Sayles & Company, an affiliate of Natixis Investment Managers, celebrates the 15-year anniversary\* of the Loomis Sayles Large Cap Growth and the Loomis Sayles All Cap Growth Strategies managed by the firm's Growth Equity Strategies (GES) team.

The Large Cap Growth and All Cap Growth strategies are among a suite of equity products managed by Aziz V. Hamzaogullari, the chief investment officer and founder of the Loomis Sayles GES team. The team's \$80.7 billion in assets under management also comprises global, international, and long/short growth equity strategies. The GES team's long-term, private equity approach is underpinned by a single investment philosophy and supported by a proprietary seven-step research framework. Through this differentiated approach, the team seeks to invest in those few high-quality businesses with sustainable competitive advantages and profitable growth when they trade at a discount to intrinsic value.

[Learn more about Loomis Sayles' Growth Equity Strategies team.](#)

"The GES team has achieved an impressive performance track record over the past 15 years for the firm's Large Cap Growth and All Cap Growth strategies, which reflects the team's commitment to disciplined investment decision-making with a long-term view that emphasizes deep fundamental research," said Kevin Charleston, chief executive officer and president of Loomis Sayles. "We are proud of the GES team's passion for delivering value for our investors by seeking to select those few high-quality businesses that can potentially generate durable and profitable long-term growth."

### Large Cap Growth Strategy

Since inception in 2006, the [Large Cap Growth Composite](#) has generated an annualized gross return of 14.85%, outperforming the Russell 1000 Growth index by 1.47%, a return that ranks ahead of 92% of large cap growth peers. The strategy has generated 2.19% of alpha, ahead of 96% of peers.

**\$73.6 billion AUM**

Inception 7/1/2006

The Large Cap Growth strategy seeks to produce long-term, excess returns vs. the Russell 1000® Growth Index on a risk-adjusted basis over a full market cycle (at least five years) through bottom-up stock selection.

### All Cap Growth Strategy

Since inception in 2006, the [All Cap Growth Composite](#) has generated an annualized gross return of 15.27%, outperforming the Russell 3000 Growth index by 2.12%, a return that ranks ahead of 82% of category peers. The strategy has generated 2.56% of alpha, ahead of 90% of peers.

**\$4.2 billion AUM**

Inception 7/1/2006

The All Cap Growth strategy seeks to produce long-term, excess returns vs. the Russell 3000® Growth Index on a risk-adjusted basis over a full market cycle (at least five years) through bottom-up stock selection.

*As 30 September 2021. Source: eASE Analytics System; eVestment Alliance is the ranking agency. (Ranking out of 180 observations; eVestment Alliance's Large Cap Growth Universe. Ranking out of 49 observations; eVestment Alliance's All Cap Growth Universe.) Annualized performance is calculated as the geometric mean of the product's returns with respect to one year. Returns-based data are gross of management fees and net of trading costs. Rankings are subject to change. Although we believe it is reliable, we cannot guarantee the accuracy of data from a third party source. This information cannot be copied or redistributed in any form.*

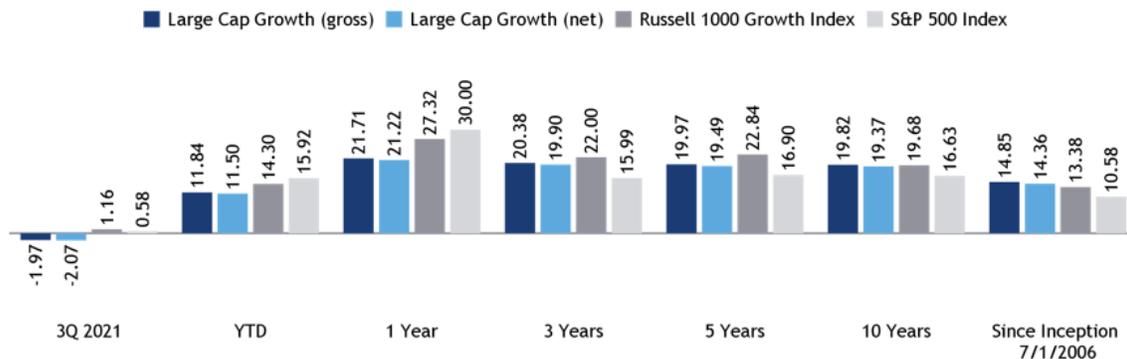
***Past performance is no guarantee of future results.***

\* The Manager for the Large Cap Growth and All Cap Growth Composites joined Loomis Sayles on May 19, 2010, and performance prior to that date was achieved at his prior firm. As required by GIPS, the prior performance information is being included as part of the Loomis Sayles Large Cap Growth and All Cap Growth Composites.

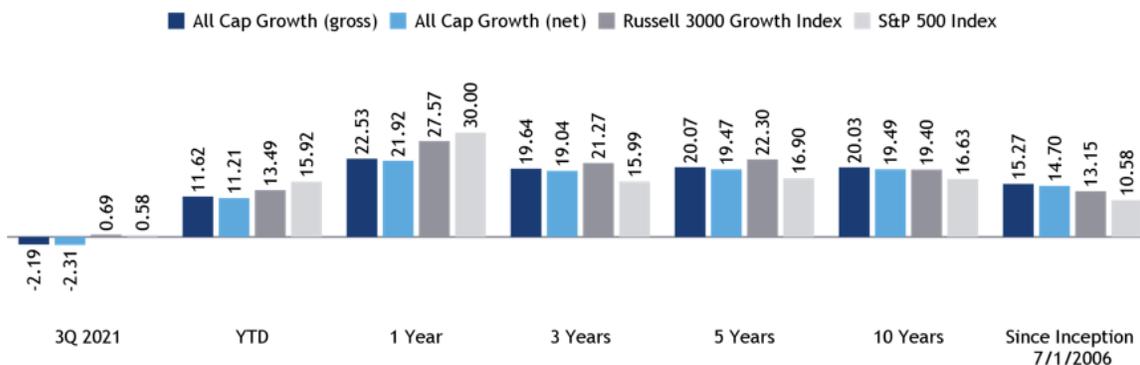
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### LOOMIS SAYLES LARGE CAP GROWTH COMPOSITE PERFORMANCE (%) AS OF 30 SEPTEMBER 2021



### LOOMIS SAYLES ALL CAP GROWTH COMPOSITE PERFORMANCE (%) AS OF 30 SEPTEMBER 2021



*Past performance is no guarantee of future results.*

There is no guarantee that the investment objective will be realized or that the strategy will generate positive or excess return.

Data Source: Loomis Sayles and the Frank Russell Company.

The benchmark for the Large Cap Growth Composite is the Russell 1000 Growth Index. Performance for the S&P 500 Index is shown as supplemental information. The benchmark for the All Cap Growth Composite is the Russell 3000 Growth Index. Performance for the S&P 500 Index is shown as supplemental information.

Returns for multi-year periods are annualized. Indices are unmanaged and do not incur fees. It is not possible to invest directly in an index. Returns may increase or decrease as a result of currency fluctuations.

**Performance data shown represents past performance and is no guarantee of future results. Current performance may be lower or higher than quoted.** Returns are shown in US dollars and are annualized for one and multi-year periods. Gross returns are net of trading costs. Net returns are gross returns less effective management fees. For most recent month-end performance, visit [www.loomissayles.com](http://www.loomissayles.com).

Loomis, Sayles & Company, L.P. ("Loomis Sayles") is an independent advisory firm registered under the Investment Advisors Act of 1940. For additional information on this and other Loomis Sayles strategies, please visit our website at [www.loomissayles.com](http://www.loomissayles.com).

## About Risk

Equity securities are volatile and can decline significantly in response to broad market and economic conditions. Foreign and emerging market securities may be subject to greater political, economic, environmental, credit, currency and information

risks. Foreign securities may be subject to higher volatility than US securities due to varying degrees of regulation and limited liquidity. These risks are magnified in emerging markets. Investments in small and mid-size companies can be more volatile than those of larger companies. Growth stocks may be more sensitive to market conditions than other equities as their prices strongly reflect future expectations. Currency exchange rates between the US dollar and foreign currencies may cause the value of the fund's investments to decline.

## 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 \$353.7 billion\*\* in assets (as of 30 September 2021).

*\*Total strategy assets include all assets managed by the respective team.*

*\*\*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' multi-affiliate approach connects clients to the independent thinking and focused expertise of more than 20 active managers. Ranked among the world's largest asset managers<sup>1</sup> with more than \$1.4 trillion assets under management<sup>2</sup> (€1,182.5 billion), Natixis Investment Managers delivers a diverse range of solutions across asset classes, styles, and vehicles. The firm is dedicated to advancing sustainable finance and developing innovative Environmental, Social, and Governance (ESG) products. Natixis Investment Managers consults and partners with its clients and offers insight on markets and assumptions to better align strategies with long-term goals.

Headquartered in Paris and Boston, Natixis Investment Managers is wholly-owned by Natixis. 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; and WCM Investment Management. Additionally, investment solutions are offered through Natixis Investment Managers Solutions and Natixis Advisors, LLC. **Not all offerings available in all jurisdictions.** For additional information, please visit Natixis Investment Managers' website at [im.natixis.com](http://im.natixis.com) | LinkedIn: [linkedin.com/company/natixis-investment-managers](https://www.linkedin.com/company/natixis-investment-managers).

Natixis Investment Managers' distribution and service groups include Natixis Distribution, LLC, 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 2021 ranked Natixis Investment Managers as the 15th largest asset manager in the world based on assets under management as of December 31, 2020.

<sup>2</sup> Assets under management ("AUM") as of June 30, 2021 is \$1,402.5 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 Manager. Excluding H2O Asset Management.

<sup>3</sup> A brand of DNCA Finance.

**Before investing, consider the fund's investment objectives, risks, charges and expenses. Please visit [www.loomissayles.com](http://www.loomissayles.com) or call 800-633-3330 for a prospectus and a summary prospectus, if available, containing this and other information. Read it carefully.**

**Natixis Distribution LLC (fund distributor FINRA|SIPC) and Loomis, Sayles & Company, L.P. are affiliated.**

