

PETER MCPHEE APPOINTED INVESTMENT SPECIALIST FOR LOOMIS SAYLES GLOBAL EQUITY FUND

SYDNEY (30 July 2020) – Investors Mutual has appointed **Peter McPhee** as Investment Specialist for the Loomis Sayles Global Equity Fund, effective immediately.

McPhee will work with Investors Mutual’s local Sales team and Loomis Sayles’ portfolio managers and investment specialists in the United States to build the profile and awareness of the Loomis Sayles Global Equity Fund with financial planning dealer groups, advice businesses, platforms, and asset consultants and research houses. He reports to Investors Mutual Head of Retail Wayne McGauley.

“We’re delighted to have someone of Peter’s calibre on board,” Wayne McGauley said. “His deep and extensive experience and understanding of the needs of financial advisers and other participants in the industry will enable him to play a key role in helping them better appreciate the value that Loomis Sayles’ time-tested global equities capability can provide for advisers and their clients.”

“I’m really pleased to be working with IML and Loomis Sayles,” McPhee said. “I’ve always been a strong believer in the value of quality active funds management, and I was attracted by Loomis Sayles’ active research-led approach, disciplined stock selection, and sound risk management. The portfolio also has minimal holdings overlap with other global equity solutions in this market. These all provide a compelling proposition for inclusion in local investors’ portfolios, and I’m looking forward to building on the great work Wayne and his team have already achieved.”

McPhee has over 30 years’ experience in funds management and retail distribution and key account relationship management. In his role as Head of Financial Institutions/Investment Specialist with BNP Paribas Investment Partners, he played a key role in launching the MFS global funds to the retail market in Australia. He also previously held senior investment specialist and business development and distribution roles with BT Investment Management, Mercer, and Pepper Investment Management.

The Loomis Sayles Global Equity Fund (APIR: IML0341AU) was launched in Australia on 1 November 2018 in a partnership between global active manager Loomis, Sayles & Company LP and Investors Mutual, both affiliates of Natixis Investment Managers. The Australian Fund is based on an existing US-domiciled strategy with a track record going back to 2004.

The Fund provides Australian investors with a style-agnostic, disciplined, bottom-up unconstrained approach to global equities investing. On the basis of deep, fundamental research, portfolio managers Eileen Riley, CFA and Lee Rosenbaum invest in quality businesses with strong underlying fundamentals, selecting a concentrated portfolio of high-quality companies with the ability to grow their intrinsic values over time and that are attractively-valued. Risk is managed through a disciplined valuation and scenario analysis framework.

The Fund has delivered its investors a total return of +17.0% in the 20 months since inception, compared to the 9.20% return from the Fund's benchmark MSCI All Country World Index.* The Loomis Sayles Global Equity Opportunity Composite has returned +10.6% per annum since inception in October 2004, compared to the benchmark's return of +7.2% per annum.**

The Fund is well-represented on financial planning dealer group approved product lists and is available on leading platforms including Asgard, BT Panorama, HUB24, Netwealth, Macquarie Wrap, MLC Navigator, and Powerwrap. The Fund has been rated 'Recommended' by Zenith and a 4-star 'Superior' rating by SQM Research. The Fund has also been rated by Lonsec (report available on request).

More information about the Loomis Sayles Global Equity Fund is available at:
<https://loomissayles.com.au/>

More Information

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**Fund since inception return calculated from 1 November 2018. **Composite since inception return calculated from 1 October 2004. Fund and Composite returns are calculated net of management fees, and assuming all distributions are re-invested. The benchmark for this Fund and the Composite is the MSCI All Country World Index NR (MSCI AC World). The investment strategy of the Fund has been designed to replicate that of the Loomis Sayles Global Equity Opportunities Composite which is a separate investment vehicle offered to qualified investors by the Fund Manager, Loomis Sayles & Company, LP. Given the Fund is new, performance of the Composite may be a useful reference point for the Fund. However, you should be aware that the Fund itself is new and has limited performance history – the past Composite performance information is NOT the past performance of the Fund. Past performance is not a reliable indicator of future performance.*

About Loomis Sayles

The Loomis Sayles Global Equity Fund offers investors a disciplined, bottom-up, unconstrained approach to global equities investing. Boston-based Loomis, Sayles & Company has been managing money successfully for investors since 1926. The firm currently manages over USD250 billion on behalf of clients all around the world. With extensive resources across the US, Europe, and Asia, Loomis Sayles has a very strong pedigree to manage global equities on behalf of investors and to continue to deliver sound long-term performance.

About Investors Mutual Limited (IML)

Investors Mutual Limited (IML) (AFSL: 229988) is a specialist Australian equities fund manager established in 1998. IML is recognised for its true-to-label 'quality and value' investment style that has been applied successfully since the firm's inception with the aim of delivering consistent returns for clients. IML is the issuer of and Responsible Entity for the Loomis Sayles Global Equity Fund. For further information, go to www.iml.com.au

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