

**OUR MISSION.
YOUR SUCCESS.**



A Brief History of Loomis, Sayles
& Company, L.P. Est. 1926

Celebrating over 90 years of service to our clients



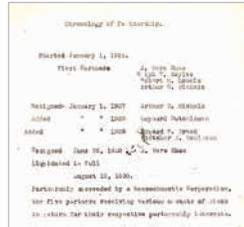
LS Loomis | Sayles is a trademark of Loomis, Sayles & Company, L.P. registered in the US Patent and Trademark Office.

Shaw, Loomis & Sayles is founded to provide investment counseling and opens its doors at 1 Federal Street, Boston, MA



1927

The firm incorporates as Loomis, Sayles & Company



1930



Loomis Sayles' assets reach \$1 million

\$1M

1936

The Dow Jones Industrial Average closes at an all-time high of 382.74, surpassing its peak for the first time since the Wall Street Crash of 1929

1954

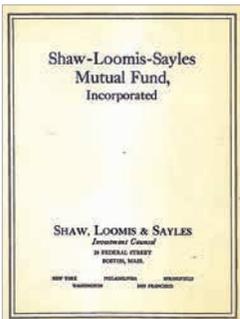
Loomis Sayles and The New England Life Companies, Inc. join forces

"We...are convinced that this combination will provide powerful assurance for the long-range best interest of our clients. It is a progressive, stimulating development for the future of Loomis, Sayles & Company."

Maurice Freeman, President, in a letter to all clients



8



1929

The firm launches its first mutual fund, the Shaw-Loomis-Sayles Mutual Fund

2

1935

The Loomis Sayles Second Fund launches, the firm's second equity fund

1951

Loomis Sayles celebrates its 25th year anniversary "with humility, but with confidence"

1976

Loomis Sayles' assets reach \$10 billion

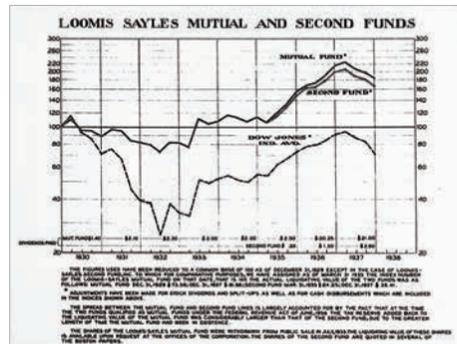
\$10B

1983



Wall Street Crash of '29
The most devastating stock market crash in history

3



6



7

25 YEARS

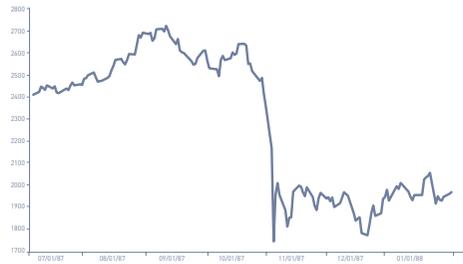
Daniel J. Fuss joins the firm
The Fixed Income Management Group is established



9



Black Monday
A sudden, dramatic fall in share prices rocked the markets, and the Dow Jones Industrial Average fell a shocking **508 points**



10

1987

1991

1998

Loomis Sayles launches **Loomis Sayles Funds**, a roster of mutual funds including:
Bond Fund (LSBDX)
Global Bond Fund (LSGBX)
Growth Fund (LSGRX)
Inflation Protected Securities Fund (LSGSX)
Small Cap Value Fund (LSSCX)

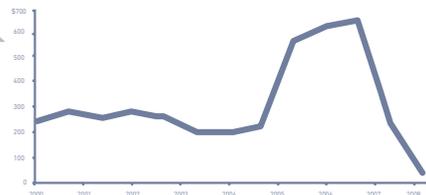
Loomis Sayles enters the Australian market bringing credit solutions to institutional investors.

2004

Loomis Sayles launches **Global Equity Opportunities Strategy**

2008

Subprime crisis
A nationwide decline in home prices triggered a banking and financial crisis that led to the US recession



Loomis Sayles' assets reach \$100 billion

\$100B

2007

Lipper names Loomis Sayles **TOP EQUITY FUND FAMILY**



Morningstar names Loomis Sayles **BOND MANAGER OF THE YEAR** for performance ending 12/31/2009



Lipper names Loomis Sayles **TOP FIXED INCOME FUND FAMILY**



2010

2012

Loomis Sayles opens its doors overseas in London & Singapore

“We are pleased to be the newest resident in the financial communities of London and Singapore, two of the world’s leading and most respected financial centers.”

Robert J. Blanding,
Chairman of the Board



Loomis Sayles' assets reach \$200 billion

\$200B

2014

2016

The Loomis Sayles **Global Equity Fund** establishes solid ratings from research houses.



2018

90 YEARS

Loomis Sayles marks **90 years** of offering investment solutions

Investors Mutual Limited and **Loomis Sayles** launch the **Loomis Sayles Global Equity Fund** in the Australian market

2020

PHOTO SOURCES

- 1 *Map of the city of Boston, Massachusetts. Planning Board, 1926. Boston Public Library.*
- 2 *Shaw-Loomis-Sayles Mutual Fund, Inc Prospectus, as of November 1929.*
- 3 *Front page of the London Herald, October 25, 1929.*
- 4 *Headshot of Robert H. Loomis, from the Loomis Sayles archives.*
- 5 *Headshot of Ralph T. Sayles, from the Loomis Sayles archives.*
- 6 *Loomis Sayles Second Fund, Inc. Prospectus, as of November 1937, from the Loomis Sayles archives.*
- 7 *25th anniversary letter from Robert H. Loomis, Chairman, Board of Directors, January 1, 1951, from Loomis Sayles archives.*
- 8 *Letter addressed to clients from Maurice T. Freeman, President, distributed December 8, 1967, from Loomis Sayles archives.*
- 9 *Daniel J. Fuss headshot from 1976.*
- 10 *Front page of the New York Daily News, October 20, 1987.*
- 11 *Thomson Reuters Lipper Fund Awards. The Lipper Fund Awards are part of the Thomson Reuters Awards for Excellence, a global family of awards that celebrate exceptional performance throughout the professional investment community. The Thomson Reuters Awards for Excellence recognize the world's top funds, fund management firms, sell-side firms, research analysts, and investor relations teams. The Thomson Reuters Awards for Excellence also include the Extel Survey Awards, the StarMine Analyst Awards, and the StarMine Broker Rankings. For more information, please contact markets.awards@thomson-reuters.com or visit excellence.thomsonreuters.com
Source: Lipper, Inc. Methodology: Loomis Sayles ranked #1 out of 46 eligible companies. Large complexes are defined as fund families with more than \$34.5 billion in total net assets.*
- 12 *Image copyright Morningstar. Morningstar, Inc. is a leading provider of independent investment research in North America, Europe, Australia, and Asia. We offer an extensive line of products and services for individual investors, financial advisors, asset managers, and retirement plan providers and sponsors. Morningstar provides data on more than 510,000 investment offerings, including stocks, mutual funds, and similar vehicles, along with real-time global market data on more than 17 million equities, indexes, futures, options, commodities, and precious metals, in addition to foreign exchange and Treasury markets. Morningstar also offers investment management services through its investment advisory subsidiaries, with more than \$180 billion in assets under advisement and management as of Dec. 31, 2015. We have operations in 27 countries.*

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