

**OUR MISSION.  
YOUR SUCCESS.**



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

Celebrating over 90 years of service to our clients



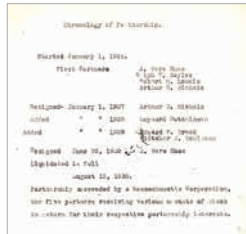
*LS Loomis | Sayles is a trademark of Loomis, Sayles & Company, L.P. registered in the US Patent and Trademark Office.*

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

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

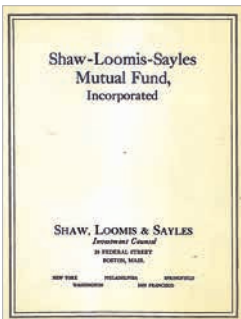
The Dow Jones Industrial Average closes at an all-time high of 382.74, surpassing its peak for the first time since the Wall Street Crash of 1929

1954

1968



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

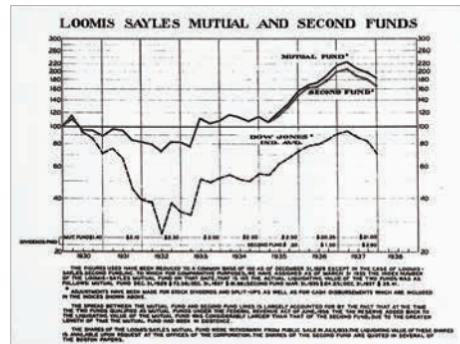
\$10B

1983



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

3



6



25 YEARS

7

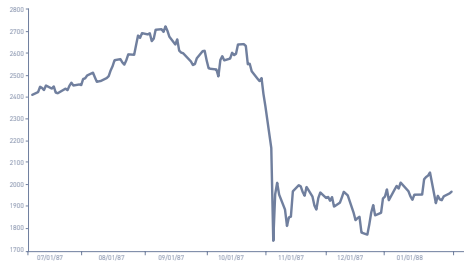
Daniel J. Fuss joins the firm  
The Fixed Income Management Group is established



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

Loomis Sayles' assets reach \$100 billion

**\$100B**

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



Loomis Sayles' assets reach \$200 billion

**\$200B**

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



1987

1991

1998

2004

2008

2007

2010

2012

2014

2016

2018

2020

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)

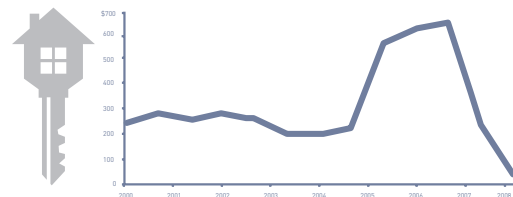
Loomis Sayles launches **Global Equity Opportunities Strategy**

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



**Subprime crisis**

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



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



**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

#### 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](mailto:markets.awards@thomson-reuters.com) or visit [excellence.thomsonreuters.com](http://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.*
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