

## **Natixis Model Portfolios Added to Merrill Lynch Investment Advisory Program**

- 10 Natixis model portfolios, 5 taxable and 5 tax-aware, added to the program
- Models are unique multi-asset, hybrid portfolios powered by advanced analytics and a highly experienced investment management team

**BOSTON, Oct. 28, 2019** – Natixis Investment Managers (Natixis) today announced that 10 Natixis model portfolios, designed exclusively for use by Merrill Lynch Wealth Management clients and advisors, have been added to the Merrill Lynch Investment Advisory Program. Effective immediately, clients and advisors have access to the Natixis Tactical Core Models and Natixis Tactical Core Tax Aware Models, which are hybrid portfolios that utilize Natixis’ investment affiliate network along with third party active managers to build a strategic allocation and express tactical tilts through exposure to Exchange Traded Funds.

The models aim to provide incremental alpha for investors through a three-pronged investment process focused on strategic portfolio design, an opportunistic overlay, and a rigorous quantitative and qualitative manager selection process. Natixis’ multi-manager structure allows the asset allocation team to draw on the broad, diverse and independent viewpoints of over 20 specialized investment managers within the Natixis organization. The strategic allocation for the models is made of high conviction, actively managed strategies and is rebalanced annually, while tactical views are applied mainly through passive strategies with a 3-6 month outlook.

“We are proud of our company’s model portfolio strategy, which we believe can help clients meet their long-term financial goals,” said David Giunta, CEO of Natixis Investment Managers in the U.S. “We look forward to providing Merrill Lynch investors access to these innovative strategies.”

“At Natixis, we are highly focused on developing and implementing personalized portfolios that align with clients’ expectations, needs and values,” said Marina Gross, Executive Vice President of Natixis Investment Managers Solutions.<sup>1</sup> “We are thrilled that Merrill Lynch Wealth Management advisors and clients now have access to Natixis’ multi-asset portfolios.”

### **About Natixis Investment Managers**

Natixis Investment Managers serves financial professionals with more insightful ways to construct portfolios. Powered by the expertise of more than 20 specialized investment managers globally, we apply Active Thinking<sup>®</sup> to deliver proactive solutions that help clients pursue better outcomes in all

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<sup>1</sup> Natixis Investment Managers Solutions is offered through Natixis Advisors, L.P., which is affiliated with Natixis Investment Managers. The Natixis Tactical Models are managed by Natixis Advisors, L.P.

## NEWS RELEASE

markets. Natixis Investment Managers ranks among the world's largest asset management firms<sup>2</sup> with more than \$1 trillion assets under management<sup>3</sup> (€898.2 billion).

Headquartered in Paris and Boston, Natixis Investment Managers is a subsidiary of Natixis. Listed on the Paris Stock Exchange, 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; Darius Capital Partners; DNCA Investments;<sup>4</sup> Dorval Asset Management; Flexstone Partners; Gateway Investment Advisers; H2O Asset Management; Harris Associates; Investors Mutual Limited; Loomis, Sayles & Company; Mirova;<sup>5</sup> MV Credit; Naxicap Partners; Ossiam; Ostrum Asset Management; Seeyond; Seventure Partners; Thematics Asset Management; Vauban Infrastructure Partners;<sup>6</sup> Vaughan Nelson Investment Management; Vega Investment Managers;<sup>7</sup> and WCM Investment Management. Investment solutions are also offered through Natixis Advisors and Dynamic Solutions. **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). Twitter: [@NatixisIM](https://twitter.com/NatixisIM)

Natixis Investment Managers' distribution and service groups include Natixis Distribution, L.P., a limited purpose broker-dealer and the distributor of various registered investment companies for which advisory services are provided by affiliated firms of Natixis Investment Managers, and Natixis Investment Managers S.A. (Luxembourg) and its affiliated distribution entities in Europe and Asia.

<sup>2</sup> Cerulli Quantitative Update: Global Markets 2019 ranked Natixis Investment Managers as the 17th largest asset manager in the world based on assets under management as of December 31, 2018.

<sup>3</sup> Net asset value as of June 30, 2019 is \$1.022 billion. Assets under management ("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 Managers.

<sup>4</sup> A brand of DNCA Finance.

<sup>5</sup> Operated in the U.S. through Mirova U.S., LLC (Mirova US)

<sup>6</sup> Not yet licensed – currently pending authorization process as a portfolio management company with the French *Autorité des marchés financiers* (the "AMF").

<sup>7</sup> A wholly-owned subsidiary of Natixis Wealth Management.

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