

# Natixis Investment Managers Affiliated Funds Earn 2019 US Lipper Fund Awards from Refinitiv

**BOSTON, March 8, 2019** – Natixis Investment Managers announced that three funds managed by Natixis-affiliated firms AlphaSimplex Group and Loomis, Sayles & Company earned 2019 US Lipper Fund Awards from Refinitiv. The funds were recognized for consistently strong risk-adjusted performance relative to peers during an annual ceremony held on March 7 in New York.

- **ASG Tactical U.S. Market Fund, A Class [USMAX]** – Ranked best fund out of 54 eligible US funds (127 share classes) for the five-year period ending November 30, 2018, for the Alternative Long/Short Equity Funds category.
- **Loomis Sayles Global Allocation Fund, Y Class [LSWWX]** – Ranked best fund out of 57 eligible US funds (154 share classes) for the 10-year period ending November 30, 2018, for the Flexible Portfolio Funds category.
- **Loomis Sayles Limited Term Government and Agency Fund, Y Class [NELYX]** – Ranked best fund out of 10 eligible US funds (21 share classes) for the 10-year period ending November 30, 2018, for the Short-Intermediate US Government Funds category.

“We are proud to congratulate the portfolio management teams at AlphaSimplex Group and Loomis Sayles for earning Lipper Fund Awards,” said David Giunta, CEO for the US and Canada at Natixis Investment Managers. “These achievements support Natixis’ belief that high-conviction active management strategies offer the opportunity to outperform over time.”

## About Lipper Fund Awards from Refinitiv

For more than three decades and in over 20 countries worldwide, the Lipper Fund Awards from Refinitiv have honored funds and fund management firms that have excelled in providing consistently strong risk-adjusted performance relative to their peers. Renowned fund data and proprietary methodology is the foundation of the Award qualification. Individual classifications of three-, five-, and ten-year periods, as well as fund families with high average scores for the three-year period, are recognized.

## Lipper Fund Classification Award

For funds with multiple share classes, Lipper selects the share class with the best Lipper Leader score as the basis for the award winner for demonstrating consistently strong risk-adjusted returns compared with peers. The highest Lipper Leader for Consistent Return (Effective Return) value determines the fund classification winner for each period. Lipper classification awards are given for the 3-, 5-, and 10-year periods and do not include the effect of sales charges. Past performance is no guarantee of, and not necessarily indicative of, future results. From Lipper Fund Awards from Refinitiv, © Refinitiv. All rights reserved. Used under license. The printing, copying, redistribution, or retransmission of this Content without express written permission is prohibited. [www.lipperfundawards.com](http://www.lipperfundawards.com)

## 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® to deliver proactive solutions that help clients pursue better outcomes in all markets. Natixis ranks among the world’s largest asset management firms<sup>1</sup> (\$917.1 billion / €802.1 billion AUM<sup>2</sup>).

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 and distribution and service groups include Active Index Advisors®;<sup>3</sup> AEW; Alliance Entreprendre; AlphaSimplex Group; Darius Capital Partners; DNCA Investments;<sup>4</sup> Dorval Asset Management;<sup>5</sup> Flexstone Partners;<sup>6</sup> Gateway Investment Advisers; H2O Asset Management;<sup>5</sup> Harris Associates; Investors Mutual Limited; Loomis, Sayles & Company; Managed Portfolio Advisors®;<sup>3</sup> McDonnell Investment Management;<sup>7</sup> Mirova;<sup>8</sup> MV Credit; Naxicap Partners; Ossiam; Ostrum Asset Management; Seeyond;<sup>8</sup> Seventure Partners; Vaughan Nelson Investment Management; and Vega Investment Managers. **Not all offerings available in all jurisdictions.** For additional information, please visit the company’s 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 includes all of the investment management and distribution entities affiliated with Natixis Distribution, L.P. and Natixis Investment Managers S.A.

Natixis Distribution, L.P. is a limited purpose broker-dealer and the distributor of various registered investment companies for which advisory services are provided by affiliates of Natixis Investment Managers.

**About AlphaSimplex Group, LLC**

AlphaSimplex Group is an investment management firm that strives to help our investors succeed in evolving financial markets by researching and analyzing market behavior and risk. We combine these insights and the expertise of our research team to create adaptive strategies that are attuned to changing market dynamics and help investors meet their long-term goals. AlphaSimplex manages over \$6.3 billion in institutional and mutual fund assets.<sup>2</sup>

**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, the 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 \$234.4 billion in assets.<sup>2</sup>

**Before investing, consider the fund's investment objectives, risks, charges, and expenses. Visit [im.natixis.com](http://im.natixis.com) or call 800-225-5478 for a prospectus or a summary prospectus containing this and other information. Read it carefully.**

All investing involves risk, including the risk of loss. Investment risk exists with equity, fixed income, and alternative investments. There is no assurance that any investment will meet its performance objectives or that losses will be avoided.

Natixis Distribution, L.P. is a limited purpose broker-dealer and the distributor of various registered investment companies for which advisory services are provided by affiliates of Natixis Investment Managers. Member FINRA | SIPC

<sup>1</sup> Cerulli Quantitative Update: Global Markets 2018 ranked Natixis Investment Managers as the 16th largest asset manager in the world based on assets under management as of December 31, 2017.

<sup>2</sup> Net asset value as of December 31, 2018. Assets under management ("AUM"), as reported, may include notional assets, assets serviced, gross assets and other types of non-regulatory AUM. AUM does not include Vega Investment Managers, which was transferred to Natixis Wealth Management in December 2018.

<sup>3</sup> A division of Natixis Advisors, L.P.

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

<sup>5</sup> A subsidiary of Ostrum Asset Management.

<sup>6</sup> Flexstone Partners assets as of 9/30/18. Flexstone was established in 2018 by bringing together four specialized private investments firms: Caspian Private Equity, Euro-Private Equity France, Euro-Private Equity Swiss and Eagle Asia Partners.

<sup>7</sup> Natixis Investment Managers transferred ownership of McDonnell Investment Management, LLC to Loomis, Sayles & Company, L.P. on 1/1/19.

<sup>8</sup> Operated in the U.S. through Ostrum Asset Management U.S., LLC.

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