The Custom Income Strategies (CIS) team is dedicated to managing customized complex portfolios for fixed income managed account clients. In short, the CIS team works with you to offer a distinct, alpha generating solution that seeks to meet your specific needs.
**Value**

**Proposition**

We believe the current rate environment is offering numerous opportunities for fixed income investors. The current challenge is how to navigate to find yield potential from sectors that can also offer investors stability and consistency going forward.

Loomis Sayles is an experienced investment manager with deep resources, foresight and flexibility, that can offer potential solutions for private account investment objectives.

The Custom Income Strategies (CIS) team is dedicated to managing customized complex accounts. CIS partners with the investment teams to actively manage the portfolio based on client objectives and guidelines. CIS also manages the asset allocation, seeking to deliver the portfolio’s target yield.
Serving clients with integrity and a global perspective since 1926.

**AUM by client base**

$277.5

US billion

**Investment expertise across asset classes**

Fixed Income: $211.4 B  Equity: $66.2 B

- US institutional
- US retail
- Non-US institutional
- Non-US retail
- Investment Grade Corporates
- Equities
- Developed Country Treasuries
- Mortgage & Structured Finance
- High Yield Corporates
- Emerging Market Debt
- Municipals
- Bank Loans
- Other
- Convertible Bonds
- Government Related

AUM as of 12/31/2022

For Investment Professional Use Only
Custom Income Strategies

PARTNERS

CIS PORTFOLIO MANAGEMENT

PRAMILA AGRAWAL
Portfolio Manager

MICHAEL FREDEKISE
Investment Analyst

ZHEN MING
Research Analyst

RUOYU WANG
Research Analyst

PORTFOLIO MANAGEMENT

IAN ANDERSON
Mortgage & Structured Finance

JOHN BELL
Bank Loans

ELISABETH COLLERAN
Emerging Markets

ANDREA DICENSE
Alpha Strategies

CAROL EMBREE
Corporate Bond

CHRIS HARMS
Core/Short/Intermediate

DAWN MANGERSON
Municipal

ALESSANDRO PAGANI
Mortgage & Structured Finance

RICK RACZKOWSKI
Core Plus

LYNDA SCHWEITZER
Global Bond

SCOTT SERVICE
Global Bond

TOOD VANDAM
High Yield

KEY RESOURCES

Trading | QRRA | Macro Strategies | Credit Research | Technology | LDI Solutions

CHIP BANKES
Trading

MICHAEL CROWELL
QRRA

TOM FAHEY
Macro Strategies

CHRISTOPHER GOOTKIND
Credit Research

MICHAEL SNOW
Technology

JUSTIN TEMAN
Pension Solutions

PRODUCT TEAMS WE PARTNER WITH WILL INCLUDE

Core/Short/Intermediate Fixed Income | Core Plus Fixed Income | Corporate Bond

Mortgage & Structured Finance | Municipal | Alpha Strategies | Bank Loans

Emerging Markets Debt | High Yield

For Investment Professional Use Only
Why Loomis Sayles
FOR PRIVATE ACCOUNTS

SKILL AND DEEP RESOURCES

LEVERAGE INSTITUTIONAL EXPERTISE IN A PRIVATE ACCOUNT FRAMEWORK
With a combination of proprietary fundamental research, experienced portfolio management and an active investment approach, we have the flexibility to offer fixed income products designed to satisfy the risk/return objectives.

LONG-STANDING ACTIVE MANAGEMENT APPROACH
Our belief in active management is supported by our commitment to in-depth, in-house research and analysis that helps us to build portfolios with a long-term view.

DEDICATED TEAM FOCUSED ON SPECIALIZED MANDATES
CIS is a centralized team that partners with investment teams to provide asset class expertise. This collaborative approach can build custom solutions based on client objectives.

CLIENT-CENTRIC FOCUS
We provide detailed, thoughtful and personalized client service.
Framework

OUTCOME-ORIENTED INVESTING

Our framework can offer exposure to different fixed income asset classes and can be customized based on your risk tolerance and time horizon.

<table>
<thead>
<tr>
<th>Sample</th>
<th>Average Quality</th>
<th>% in High Yield</th>
<th>% in Agency MBS</th>
<th>% in Securitized Credit</th>
<th>% in Emerging Markets</th>
<th>% in Municipals</th>
<th>% in Subordinated Debt</th>
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<tbody>
<tr>
<td>CONSERVATIVE</td>
<td>A3</td>
<td>0%</td>
<td>20%</td>
<td>10%</td>
<td>5%</td>
<td>20%</td>
<td>5%</td>
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<td>BAA1</td>
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<td>25%</td>
<td>15%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>ENHANCED</td>
<td>BAA2</td>
<td>20%</td>
<td>25%</td>
<td>20%</td>
<td>15%</td>
<td>5%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: Loomis Sayles.

The chart presented above is shown for illustrative purposes only as a sampling output. Some or all of the information on this chart may be dated, and, therefore, should not be the basis to purchase or sell any securities. The information is not intended to represent any actual portfolio. Scenario analysis has inherent limitations and should not be viewed as predictive of future events. It relies on opinions, assumptions and mathematical models, which can turn out to be incomplete or inaccurate. Actual results will be different. Any investment that has the possibility for profits also has the possibility of losses. There is no guarantee that the investment objective will be realized or that the strategy will generate positive or excess return. Past performance is no guarantee of future results.
Private Accounts
A S P E C T R U M O F P O T E N T I A L S O L U T I O N S

We can customize asset class exposure based on relative value and client objectives, and overlay strategies to offer tax efficiency, ESG constraints and other client requirements.

MUNICIPAL BONDS

BLEND OF MUNICIPAL AND TAXABLE

TAXABLE CORE FIXED INCOME

TAX CONSIDERATIONS

ESG

There is no guarantee that the investment objective will be realized or that the strategy will generate positive or excess return. Any investment that has the possibility for profits also has the possibility of losses.

Let’s Connect

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There is no guarantee that the investment objective will be realized or that the strategy will generate positive or excess return. Any investment that has the possibility for profits also has the possibility of losses.

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The attached material, provided to Natixis Distribution by the Affiliate, highlights the style and investment process of the Affiliate. Additional information about the Affiliate, including, but not limited to its registration status in a particular jurisdiction, as well as additional information about the Affiliate’s managed account strategies and/or investment products, including, but not limited to disclosure documents, registration documents, and contracts, as applicable, should be obtained from the Affiliate. Natixis Distribution’s principal office is located at 888 Boylston Street, Suite 800, Boston, MA 02199-8197. 800-862-4863. im.natixis.com.

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