LOOMIS | SAYLES

Brochure Supplement dated April 1, 2025
Loomis, Sayles & Company, L.P.

Investment Strategies and Portfolio Managers

Included on the following pages is certain information about the persons who make investment decisions for client accounts in each institutional strategy offered by Loomis Sayles. Please refer to the strategy referenced below in which you are invested and refer to the separate supplement for each Portfolio Manager. The Supplements are in alphabetical order.

Fixed Income Strategies	Portfolio Manager(s)
3-15 Year National Municipal Bond, Intermediate Duration Municipal Bond, Medium Duration Municipal Bond, Short Duration Municipal Bond:	Pramila Agrawal, Dawn Mangerson
Active U.S. Treasury:	Michael Gladchun, Peter Palfrey
Agency MBS:	Ian Anderson, Barath Sankaran
Asia Bond Plus:	Elisabeth Colleran
Buy & Maintain, Insurance, Cash Flow Matching[1]:	
Core Fixed Income, Intermediate Duration Fixed Income, Short Duration Fixed Income:	Pramila Agrawal, Christopher Harms
Core Plus Full Discretion:	Pramila Agrawal, Matthew Eagan, Brian Kennedy, Bryan Hazelton
High Yield Full Discretion, US High Yield:	Pramila Agrawal, Matthew Eagan, Brian Kennedy, Todd Vandam, Peter Sheehan, Christopher Romanelli
Investment Grade Corporate/Credit Bond:	Pramila Agrawal, Richard Raczkowski, Devon McKenna
Municipal Crossover:	Pramila Agrawal, Christopher Harms, Dawn Mangerson

[1]Various fixed income strategies are able to be run in the Buy & Maintain, Insurance, or Cash Flowing Matching style to meet specific client objectives.

Core Disciplined Alpha, Long Duration Disciplined Alpha, Long Corporate Disciplined Alpha, Long Credit Disciplined Alpha, Corporate Disciplined Alpha, Intermediate Core Discipline Alpha, Intermediate Credit Disciplined Alpha, Long Government/Credit Disciplined Alpha, Credit Disciplined Alpha:	Lynne Royer, Seth Timen, Brad Stevens
Core Fixed Income, Intermediate Duration Fixed Income, Short Duration Fixed Income:	Daniel Conklin, Christopher Harms, Clifton Rowe
Core Plus Fixed Income:	Peter Palfrey, Richard Raczkowski
Credit Asset:	Andrea DiCenso, Kevin Kearns, Thomas Stolberg
Custom Income Strategies (CIS):	
Conservative, Moderate, Enhanced:	Pramila Agrawal, Christopher Harms
Conservative Hybrid, Enhanced Hybrid:	Pramila Agrawal, Chris Harms, Dawn Mangerson
Moderate Hybrid, All Tax Exempt Muni:	Pramila Agrawal, Dawn Mangerson
Dynamic Fixed Income:	Matthew Eagan, Brian Kennedy, Tom Fahey
Emerging Markets Corporate Debt, Emerging Markets Short Duration Credit:	Elisabeth Colleran, Edgardo Sternberg
Emerging Markets Debt Local Currency:	David Rolley, Edgardo Sternberg
Emerging Markets Debt Blended Total Return:	Andrea DiCenso, Peter Yanulis
Euro Investment Grade Credit, Sustainable Euro Investment Grade Credit, Euro High Yield Credit, Sustainable Euro High Yield Credit:	Rik den Hartog, Pim van Mourik Broekman, Luuk Cummins, Quirijn Landman, Sipke Moes, Ronald Schep, Marco Zanotto
Flexible Income:	Matthew Eagan, Scott Darci
Global Bond, Global Debt Unconstrained:	David Rolley, Lynda Schweitzer, Scott Service

Global Credit, Global Corporate:	Heather Ridill, David Rolley, Lynda Schweitzer, Scott Service
Global Disciplined Alpha:	Lynne Royer, Lynda Schweitzer, Scott Service, Seth Timen
Global High Yield:	Matthew Eagan, Brian Kennedy, Todd Vandam, Peter Sheehan
Global High Yield Full Discretion:	Matthew Eagan, Brian Kennedy, Todd Vandam, Peter Sheehan
High Grade Corporate:	Kevin Kearns, Richard Raczkowski
High Yield Full Discretion, High Yield Conservative:	Matthew Eagan, Brian Kennedy, Todd Vandam, Peter Sheehan
Opportunistic Securitized Credit:	Stephen L'Heureux, Stephen LaPlante, Alessandro Pagani, Jennifer Thomas
Inflation Protected Securities:	Elaine Kan, Kevin Kearns
Investment Grade Corporate/Credit Bond, Investment Grade Intermediate Corporate Bond:	Richard Raczkowski, Devon McKenna
Core Securitized:	Ian Anderson, Stephen LaPlante, Alessandro Pagani, Barath Sankaran, Jennifer Thomas
Long Duration Government/Credit Fixed Income, Long Duration Corporate Bond, Long Duration Credit Bond, Liability Driven Investing:	Neil Burke, John Hyll
Multi-Asset Risk Premia:	Kevin Kearns, Harish Sundaresh
Global Multi-Asset Income:	Vivek Garg, Elaine Kan, Kevin Kearns
Multisector Full Discretion, Multisector Credit, Strategic Income, Core Plus Full Discretion:	Matthew Eagan, Brian Kennedy
Investment Grade Private Credit:	Chris Gudmastad
Investment Grade Securitized Credit:	Stephen LaPlante, Alessandro Pagani, Clifton Rowe, Jennifer Thomas
Senior Floating Rate and Fixed Income:	Michael Klawitter, Heather Young
Senior Loan:	Michael Klawitter, Heather Young

Strategic Alpha:	Matthew Eagan, Brian Kennedy, Todd Vandam
Tactical Credit Asset Opportunities:	Andrea DiCenso, Kevin Kearns, Thomas Stolberg
US High Yield:	Matthew Eagan, Brian Kennedy, Todd Vandam, Peter Sheehan
U.S. Treasury STRIPS:	Pramila Agrawal
World Credit Asset:	Andrea DiCenso, Kevin Kearns, Thomas Stolberg

Equity Strategies	**Portfolio Manager(s)**
All Cap Growth, Large Cap Growth, Global Growth, International Growth, Long/Short Growth Equity:	Aziz Hamzaogullari
Global Allocation:	Matthew Eagan, David Rolley, Eileen Riley, Lee Rosenbaum
Global Equity Opportunities:	Eileen Riley, Lee Rosenbaum
Global Emerging Markets Equity, Global Emerging Markets Equity Long/Short:	Ashish Chugh
Mid Cap Growth:	Mark Burns, John Slavik, Nathaniel Roberts, Anand Vankawala
Small Cap Growth, Small/Mid Cap Growth:	Mark Burns, John Slavik
Small/Mid Cap Core, Small Cap Value:	Joseph Gatz, Jeffrey Schwartz

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Pramila Agrawal

Brochure Supplement dated January 12, 2021

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Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Pramila Agrawal (born 1978) is a portfolio manager and head of the custom income strategies group ("CIS group") at Loomis Sayles. She is also a member of Loomis Sayles' Board of Directors. She joined Loomis Sayles in 2007 as an analyst in the quantitative research risk analysis group. In 2015, she joined the relative return team as a strategist and was promoted to portfolio manager for the buy & maintain strategies in 2018. In 2019, she was named head of the CIS group and began managing the municipal bond products in 2021. She earned a BE from BITS in India and an MS and PhD in Robotics from Vanderbilt University.

Pramila holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Pramila is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Ian Anderson

Brochure Supplement dated January 12, 2021

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Educational Background and Business Experience

Ian. Anderson (born 1974) is a portfolio manager and the agency MBS strategist for the mortgage and structured finance team at Loomis Sayles. He has been with Loomis Sayles since 2011. He earned a BS in economics from the University of Chicago and an MS in finance from the George Washington University.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Ian is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Neil A. Burke

Brochure Supplement dated January 12, 2021

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Additional information about Neil A. Burke is available on the SEC's website at www.adviserinfo.sec.gov.

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(800) 343-2029

Educational Background and Business Experience

Neil (born 1969) is a portfolio manager for the relative return team at Loomis Sayles. He has been with Loomis Sayles since 1997. He earned a BA from Catholic University and earned an MBA from Boston College.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with Neil's duties, he holds the Series 7 General Securities Representative license with the Financial Industry Regulatory Authority ("FINRA"). In addition, he also holds the Series 63 Uniform Securities Agent State Law registration with FINRA. Each of these registrations is held through Loomis Sayles' wholly-owned, limited purpose broker-dealer affiliate.

In addition, and also in connection with Neil's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), he acts in the capacity of an "associated person" and holds a Series 3 National Commodity Futures license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Neil is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Mark F. Burns

Brochure Supplement dated January 12, 2021

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Educational Background and Business Experience

Mark Burns (born 1970) is a co-portfolio manager of the Loomis Sayles' specialty growth strategies. He has been with Loomis Sayles since 1999 as a small cap growth analyst working on a range of sectors, including technology, consumer and healthcare. He earned a BA from Colby College and earned an MBA from the Johnson School of Management at Cornell University.

Mark holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Mark is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Ashish Chugh

Brochure Supplement dated January 12, 2021

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(800) 343-2029

Educational Background and Business Experience

Ashish Chugh (born 1975) is the portfolio manager of the long-only and long-short global emerging market equity strategies at Loomis Sayles. He has been with Loomis Sayles since 2018. Prior to joining Loomis Sayles from Och-Ziff Capital in Hong Kong, he was a managing director and manager of an emerging markets portfolio for Och-Ziff Capital's multi-strategy hedge fund. Prior to this, he spent a decade at the Wellington Management Company in Boston as a managing director where he focused on investing in long-short equities in emerging markets. Previously, he was an associate at Blue Chip Venture Company, where he was responsible for venture capital and private equity investments. He earned a BASc in electrical & computer engineering from the University of British Columbia and an MBA from Harvard Business School.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Ashish is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Elisabeth Colleran

Brochure Supplement dated January 12, 2021

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Boston, MA 02111
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Educational Background and Business Experience

Elisabeth Colleran (born 1963) is a portfolio manager for emerging market debt portfolios at Loomis Sayles. She has been with Loomis Sayles since 2003. She earned a BA from the University of Rochester and an MBA from the University of New Hampshire.

Elisabeth holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Elisabeth is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Daniel Conklin

Brochure Supplement dated January 12, 2021

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One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Dan Conklin (born 1988) is a portfolio manager for the relative return team at Loomis Sayles. He joined Loomis Sayles in 2012 as a fixed income client portfolio analyst. He moved to the relative return team in 2014 as an investment analyst and was promoted to senior investment analyst in 2018, and then to associate portfolio manager in 2019. He earned a BS from the University of Massachusetts, Lowell and an MS in Finance from Northeastern University.

Dan holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Dan is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Luuk Cummins

Brochure Supplement dated January 12, 2021

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3521 AZ Utrecht
The Netherlands
+31 30 8009223

Educational Background and Business Experience

Luuk Cummins (born 1986) is a portfolio manager and member of the investment committee of the euro credit team at Loomis Sayles (Netherlands) B.V. He is responsible for co-managing the euro investment grade credit, sustainable euro investment grade credit and euro high yield strategies, with a focus on the healthcare and real estate sectors. He joined Loomis Sayles in 2020 from Kempen Capital Management where he was a senior portfolio manager for the euro credit team. He earned an MSc in business and economics from Erasmus University Rotterdam.

Luuk holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Luuk is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Scott A. Darci

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Scott A. Darci that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

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One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Scott Darci (born 1982) is a portfolio manager, associate portfolio manager and convertibles & equity strategist for the full discretion team at Loomis Sayles. He is an associate portfolio manager of the strategic alpha and strategic alpha opportunistic strategies. He is also a portfolio manager for the flexible income strategy. He joined Loomis Sayles in 2008 as a member of the equity derivatives team responsible for researching, implementing and monitoring derivative strategies. He earned a BA from Dartmouth College and an MS from Boston University.

Scott holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Scott is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Rik den Hartog

Brochure Supplement dated January 12, 2021

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Loomis, Sayles & Company, L.P.
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The Netherlands
+31 30 8009223

Educational Background and Business Experience

Rik den Hartog (born 1985) is a co-head, member of the investment committee and a portfolio manager of the euro credit team at Loomis Sayles (Netherlands) B.V. He is responsible for co-managing the euro investment grade credit, sustainable euro investment grade credit and euro high yield credit strategies, with a focus on the banking and basic resources sectors. He joined Loomis Sayles in 2020 from Kempen Capital Management where he was a senior portfolio manager for the euro credit team and member of the investment committee. He earned an MSc in financial economics with honors from Erasmus University Rotterdam.

Rik holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Rik is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Andrea DiCenso

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Andrea DiCenso that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

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(800) 343-2029

Educational Background and Business Experience

Andrea DiCenso (born 1981) is a co-portfolio manager for the multi-asset credit and emerging markets debt blended total return strategies at Loomis Sayles. She is also a senior strategist for the alpha strategies group. Since 2009, she has been a strategist within the alpha strategies group, implementing emerging market and commodity related themes within the long-only and multi-asset products. She joined Loomis Sayles in 2006 as a junior analyst covering the investment grade and high yield commodity related sectors. She earned a BS in finance from Bentley College and an MBA from Northeastern University.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Andrea is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Matthew J. Eagan

Brochure Supplement dated January 12, 2021

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Additional information about Matthew J. Eagan is available on the SEC's website at www.adviserinfo.sec.gov.

Loomis, Sayles & Company, L.P.
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Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Matt Eagan (born 1966) is a portfolio manager and head of the full discretion team at Loomis Sayles. He is also a member of Loomis Sayles' Board of Directors. He has been with Loomis Sayles since 1997. He earned a BA from Northeastern University and earned an MBA from Boston University.

Matt holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with Matt's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), he acts in the capacity of an "associated person" and holds a Series 3 National Commodity Futures license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Matt is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Tom Fahey

Brochure Supplement dated January 12, 2021

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Educational Background and Business Experience

Tom Fahey (born 1969) is a co-portfolio manager and co-director of macro strategies. Tom joined Loomis Sayles in 2010. Previously, he was a senior portfolio manager and global bond strategist at Standish Mellon Asset Management. Prior to joining Standish, he worked at The Bank Credit Analyst (BCA) Research Group as a foreign exchange strategist. Tom earned a BA from St. Francis Xavier University in Nova Scotia and an MA from Concordia University in Quebec.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Tom is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Vivek Garg

Brochure Supplement dated March 31, 2023

This brochure supplement provides information about Vivek Garg that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

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Educational Background and Business Experience

Vivek Garg (born 1979) is a portfolio manager at Loomis Sayles. He is responsible for managing various equity strategies for the alpha strategies group. He is also the lead convertible bonds and equity option strategist for the platform. He joined Loomis Sayles in 2013 from New York Life Investment Management, where he was a vice president responsible for quantitative research and portfolio management for global equity portfolios. He earned an undergraduate degree in computer engineering from Pune University and an MBA from Duke University, The Fuqua School of Business.

Vivek holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

None.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Vivek is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Joseph R. Gatz

Brochure Supplement dated January 12, 2021

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Loomis, Sayles & Company, L.P.
39533 Woodward Ave., Suite 300
Bloomfield Hills, MI 48304
(248) 646-2100

Educational Background and Business Experience

Joe Gatz (born 1962) is a portfolio manager at Loomis Sayles, where he co-manages small cap value and small mid cap core strategies. In addition to his portfolio management responsibilities, he also maintains primary research coverage for several holdings within both strategies, with an emphasis on special situations, as well as industrials, healthcare and energy. He has been with Loomis Sayles since 1999. He earned a BA from Michigan State University and an MBA from Indiana University.

Joe holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Joe is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Michael F. Gladchun

Brochure Supplement dated January 12, 2021

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(800) 343-2029

Educational Background and Business Experience

Michael Gladchun (born 1978) is an associate portfolio manager on the relative return team at Loomis Sayles, where he helps oversee the core plus fixed income strategy. He is also a co-portfolio manager for the active US Treasury strategies. He joined Loomis Sayles in 2004 as a global settlements administrator and joined the trading desk in 2006. He has been a co-leader of the US yield curve sector team since 2014. He earned a BA from the University of Vermont and an MBA from Boston University.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Michael is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Chris P. Gudmastad

Brochure Supplement dated March 31, 2023

This brochure supplement provides information about Chris P. Gudmastad that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
800 Washington Avenue North, Suite 150
Minneapolis, MN 55401

Educational Background and Business Experience

Chris P. Gudmastad (born 1976) is a portfolio manager and managing director of private credit at Loomis Sayles. He joined Loomis Sayles in 2022 and is primarily focused on private credit. Prior to joining Loomis Sayles, he was a vice president and head of private credit at Securian Asset Management. Prior to this, he was a vice president of private credit and alternative investments at National Life of Vermont. He earned a BA from the University of Minnesota, Morris and an MBA from the Simon Business School at the University of Rochester. He is a member of CFA Society Minnesota.

Chris holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Chris is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Aziz V. Hamzaogullari

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Aziz V. Hamzaogullari that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Additional information about Aziz V. Hamzaogullari is available on the SEC's website at www.adviserinfo.sec.gov.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Aziz Hamzaogullari (born 1969) is the chief investment officer and founder of the growth equities strategies team and portfolio manager at Loomis Sayles. He is also a member of the Board of Directors of Loomis Sayles. Aziz joined Loomis Sayles in 2010 from Evergreen Investments where he was a senior portfolio manager and managing director. He joined Evergreen in 2001, was promoted to director of research in 2003 and portfolio manager in 2006. He was head of Evergreen's Berkeley Street Growth Equity team and was the founder of the research and investment process. Prior to joining Evergreen, he was a senior equity analyst and portfolio manager at Manning & Napier Advisors. He earned a BS from Bilkent University, Turkey, and an MBA from George Washington University. He is also a CFA charterholder and a member of CFA Society Boston.

Aziz holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Aziz is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Christopher T. Harms

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Christopher T. Harms that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Chris Harms (born 1959) is a portfolio manager and co-head of the relative return team at Loomis Sayles. He has been with Loomis Sayles since 2010. Prior to joining Loomis Sayles, he was a senior vice president and managing director of an investment management team at CapitalSource Bank. Prior to CapitalSource, he was a managing director and senior fixed income portfolio manager at Mackay Shields. He earned a BSBA from Villanova University and an MBA from Drexel University.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Chris is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Bryan C. Hazelton

Brochure Supplement dated March 29, 2024

This brochure supplement provides information about Bryan C. Hazelton that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Bryan Hazelton (born 1986) is a portfolio manager on the full discretion team where he co-manages the team's insurance mandates at Loomis Sayles. He is also an associate portfolio manager on the core plus full discretion, multisector full discretion, and multisector credit mandates. He also serves as a strategist across the full discretion mandates, with a focus on investment grade credit selection. He joined Loomis Sayles in 2011 as an investment analyst on the full discretion team. Previously, he was a portfolio analyst at The Harvard Investment Management Company. He earned a BA from Bentley University and an MBA from The Wharton School at The University of Pennsylvania. He is also a member of the CFA Society Boston.

Bryan holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Bryan is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

John Hyll

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about John Hyll that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Additional information about John Hyll is available on the SEC's website at www.adviserinfo.sec.gov.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

John Hyll (born 1954) is a portfolio manager for the fixed income group at Loomis Sayles. He co-manages long duration portfolios, including the long duration corporate bond strategy, long duration government/credit strategy, and customized LDI mandates. He has been with Loomis Sayles since 1987. He earned a BBA and an MBA from Baldwin Wallace College.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with John's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), he acts in the capacity of an "associated person" and holds a Series 3 National Commodity Futures license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, John is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Elaine Kan

Brochure Supplement dated March 31, 2023

This brochure supplement provides information about Elaine Kan that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Elaine Kan (born 1973) is a portfolio manager and rate & currency strategist for the fixed income group at Loomis Sayles. She is also responsible for implementing interest rates and currency derivatives strategies for the alpha strategies group, as well as providing support to other products across the fixed income group. She joined Loomis Sayles in 2011 from Convexity Capital Management Co., where she was a portfolio analyst. She earned a BS in engineering, a BS in finance and a master's degree in electrical engineering from the Massachusetts Institute of Technology.

Elaine holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

None.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Elaine is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Kevin P. Kearns

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Kevin P. Kearns that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Kevin Kearns (born 1962) is a portfolio manager and head of the alpha strategies group at Loomis Sayles. Before joining Loomis Sayles in 2007, he was the director of derivatives, quantitative analysis and risk management at Boldwater Capital Management, where he was responsible for the development and implementation of a credit-focused relative value hedge fund. He managed derivative based strategies focused on capital structure arbitrage, event driven and relative value strategies. Prior to that, he spent 14 years with Fleet Boston as the managing director and group head of credit derivatives. He earned a degree in physics from Bridgewater State College and an MBA from Bryant College.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Kevin is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Brian P. Kennedy

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Brian P. Kennedy that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Brian Kennedy (born 1967) is a portfolio manager on the full discretion team at Loomis Sayles. He has been with Loomis Sayles since 1994. Prior to being named as a portfolio manager in 2013, he served Loomis Sayles in a number of capacities including as a product manager for the full discretion investment team, a securitized and government bond trader, a trader of bank loans, while also trading high yield, convertibles, derivatives and equities. He earned a BS from Providence College and an MBA from Babson College.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with Brian's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), he acts in the capacity of an "associated person" and holds a Series 3 National Commodity Futures license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Brian is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Michael L. Klawitter

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Michael L. Klawitter that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Michael Klawitter (born 1970) is a portfolio manager on the full discretion team managing the bank loan strategies at Loomis Sayles. Additionally, he serves as a strategist for the team, focused on bank loans. Prior to serving as a portfolio manager, he served as an analyst and strategist for the bank loan team. He joined Loomis Sayles in 2000. He earned a BA from the University at Buffalo and an MSF from Boston College.

Michael holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Michael is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Stephen C. L'Heureux

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Stephen C. L'Heureux that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Stephen L'Heureux (born 1959) is the global commercial real estate and CMBS strategist for the mortgage and structured finance team at Loomis Sayles. He is also a co-portfolio manager for select securitized credit investment strategies. He has been with Loomis Sayles since 2008. He earned a BA from McGill University and an MA from the University of Toronto.

Stephen holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Stephen is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Quirijn Landman

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Quirijn Landman that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
Stadsplateau 7
3521 AZ Utrecht
The Netherlands
+31 30 8009223

Educational Background and Business Experience

Quirijn Landman (born 1984) is a portfolio manager for the euro credit team at Loomis Sayles (Netherlands) B.V. He is responsible for co-managing the euro investment grade credit, sustainable euro investment credit and euro high yield credit strategies, with a focus on the financial services, infrastructure and technology sectors. He joined Loomis Sayles in 2020 from Kempen Capital Management where he was a senior portfolio manager for the euro credit team. Prior to becoming a portfolio manager, he was a fiduciary manager for insurance clients at Kempen Capital Management. He earned an MSc in aerospace engineering from Delft University of Technology.

Quirijn holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Quirijn is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Stephen M. LaPlante

Brochure Supplement dated March 31, 2023

This brochure supplement provides information about Stephen M. LaPlante that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Stephen LaPlante (born 1982) is a portfolio manager and securitized strategist on the mortgage and structured finance team at Loomis Sayles. He is a securitized strategist for the full discretion team, working directly with portfolio managers to structure the allocation to the sector. He is also a co-portfolio manager and senior analyst on the mortgage and structured finance team. He has been with Loomis Sayles since 2017. Before joining Loomis Sayles, he was a senior analyst at Manulife, responsible for the mortgage credit sector including non-agency RMBS and agency risk transfer securities. Prior to this, he was a senior analyst at Income Research and Management, serving as the primary analyst in commercial mortgage credit, including CMBS and agency CMBS securities. Before this, he was at White Mountains Advisors as a portfolio analyst, maintaining portfolio level analytics, evaluating pricing models, and monitoring exposures across the firm's portfolios, which included ABS, CMBS, RMBS holdings as well as Agency, Sovereign and Corporate securities. He earned a BS from Union College and an MBA from Carnegie Mellon University.

Stephen holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Stephen is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Dawn Mangerson

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Dawn Mangerson that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Lincoln Centre
18W 140 Butterfield Road, Suite 1200
Oakbrook Terrace, IL 60181
(630) 684-8600

Educational Background and Business Experience

Dawn Mangerson (born 1964) is a co-portfolio manager for the municipal bond product suite at Loomis Sayles. She joined Loomis Sayles in 2019 as part of the firm's acquisition of McDonnell Investment Management, where she had most recently served as a managing director and director of the municipal portfolio management team. Previously, she was managing director and senior portfolio manager of the municipal client group. She earned a BS in finance from DePaul University.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Dawn is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Devon McKenna

Brochure Supplement dated January 1, 2024

This brochure supplement provides information about Devon McKenna that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Devon McKenna (born 1983) is a portfolio manager on the relative return team, where he co-manages the team's investment grade corporate bond strategies at Loomis Sayles. He is also an investment strategist for the team's core plus strategy, assisting with portfolio construction, risk management and market analysis. He joined Loomis Sayles in 2007, holding positions in operations, client service and trading before joining the relative return team in 2018. He earned a BS from Bentley University and an MBA from Boston College. He is a member of the CFA Society of Boston.

Devon holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Devon is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Sipke Moes

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Sipke Moes that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
Stadsplateau 7
3521 AZ Utrecht
The Netherlands
+31 30 8009223

Educational Background and Business Experience

Sipke Moes (born 1986) is a portfolio manager for the euro credit team Loomis Sayles (Netherlands) B.V. He is responsible for co-managing the euro investment grade credit, sustainable euro investment grade credit and euro high yield credit strategies, with a focus on the chemicals, media, oil and gas and telecommunications sectors. He joined Loomis Sayles in 2020 from Kempen Capital Management where he was a senior portfolio manager for the euro credit team, and the ESG specialist of the team. He earned a BSc in econometrics, operations research and actuarial sciences, a BA in Scandinavian languages, literatures and linguistics, and an MSc in econometrics from the University of Groningen.

Sipke holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Sipke is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Alessandro Pagani

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Alessandro Pagani that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Alessandro Pagani (born 1969) is a portfolio manager and head of the mortgage and structured finance team at Loomis Sayles. He leads the team in developing investment strategies for mortgage pass-through, asset-backed, residential and commercial mortgage-backed securities across all fixed income products. He also co-manages the securitized investment strategies. He has been with Loomis Sayles since 2008. Before joining Loomis Sayles, he served as co-head of global research and credit at Cambridge Place Investment Management and director of asset-backed securities research at Banc One Capital Markets. He earned his doctoral degree in economics and commerce from the University of Brescia in Italy.

Alessandro holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Alessandro is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Peter W. Palfrey

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Peter W. Palfrey that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Additional information about Peter W. Palfrey is available on the SEC's website at www.adviserinfo.sec.gov.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Peter Palfrey (born 1960) is a portfolio manager for the fixed income group at Loomis Sayles. He co-manages the core plus strategy and the active US Treasury strategies. He has been with Loomis Sayles since 2001. Peter earned a BA from Colgate University.

Peter holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with Peter's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), he acts in the capacity of an "associated person" and holds a Series 3 National Commodity Futures license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Peter is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Richard G. Raczkowski

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Richard G. Raczkowski that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Additional information about Richard G. Raczkowski is available on the SEC's website at www.adviserinfo.sec.gov.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Rick Raczkowski (born 1961) is a portfolio manager and co-head of the relative return team at Loomis Sayles. He co-manages the corporate bond strategies and the core plus fixed income strategy. He is also a member of the Board of Directors of Loomis Sayles. He has been with Loomis Sayles since 2001.He earned a BA from the University of Massachusetts and an MBA from Northeastern University.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with Rick's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), he acts in the capacity of an "associated person" and holds a Series 3 National Commodity Futures license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Rick is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Heather Ridill

Brochure Supplement dated October 1, 2022

This brochure supplement provides information about Heather Ridill that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Heather Ridill (born 1983) is a global credit strategist on the global fixed income team and a co-portfolio manager for the global credit and global corporate strategies at Loomis Sayles. She has been with Loomis Sayles since 2007. She earned a BA from Fordham University and an MBA from Boston College.

Heather holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Heather is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Eileen N. Riley

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Eileen N. Riley that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

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One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Eileen Riley (born 1974) is Co-Head of Global Equity Opportunities and portfolio manager for the global equity opportunities and global allocation strategies at Loomis Sayles. She joined Loomis Sayles in 1998. She earned a BA from Amherst College and an MBA from Harvard University.

Eileen holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Eileen is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' deputy investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Nathaniel C. Roberts

Brochure Supplement dated April 4, 2021

This brochure supplement provides information about Nathaniel C. Roberts that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Nathaniel Roberts (born 1976) is a member of the specialty growth strategies team at Loomis Sayles. He is also a senior equity research analyst for the small cap and small-mid cap growth products and a co-portfolio manager for the mid cap growth product. He joined Loomis Sayles in 2007. He earned a BA from Bucknell University and an MBA from the Sloan School of Management at the Massachusetts Institute of Technology.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Nathaniel is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

David W. Rolley

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about David W. Rolley that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

David Rolley (born 1952) is a portfolio manager and co-head of the global fixed income team at Loomis Sayles. He has been with Loomis Sayles since 1994. He earned a BA from Occidental College and studied post-graduate economics at the University of Pennsylvania.

David holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with David's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), he acts in the capacity of an "associated person" and holds a Series 3 license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, David is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Christopher J. Romanelli

Brochure Supplement dated March 29, 2024

This brochure supplement provides information about Christopher J. Romanelli that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Christopher Romanelli (born 1983) is a portfolio manager on the full discretion team where he co-manages the team's high yield-focused insurance and buy & maintain product at Loomis Sayles. He is also an associate portfolio manager on the team's suite of high yield products. Additionally, he is a portfolio strategist for the team, working closely with the team's credit strategist on the high yield credit portion of the team's portfolios and directly with the portfolio management team on portfolio structuring. He joined Loomis Sayles in 2010 as a portfolio analyst covering high yield. Previously, he was a senior associate at PanAgora Asset Management where he provided operational support to the investment process. He earned a BS from Gordon College and an MS from Boston College.

Christopher holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Christopher is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Lee M. Rosenbaum

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Lee M. Rosenbaum that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Lee Rosenbaum (born 1972) is Co-Head of Global Equity Opportunities and portfolio manager for the global equity opportunities and global allocation strategies at Loomis Sayles. He has been with Loomis Sayles since 2008. He earned a BS from the United States Coast Guard Academy and an MBA from the Sloan School of Management at the Massachusetts Institute of Technology.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Lee is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Clifton V. Rowe

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Clifton V. Rowe that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Additional information about Clifton V. Rowe is available on the SEC's website at www.adviserinfo.sec.gov.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Cliff Rowe (born 1970) is a portfolio manager for the relative return team and the mortgage and structured finance team at Loomis Sayles. He has been with Loomis Sayles since 1992. He earned a BBA from James Madison University and an MBA from the University of Chicago.

Cliff holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with Cliff's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), he acts in the capacity of an "associated person" and holds a Series 3 National Commodity Futures license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Cliff is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Lynne A. Royer

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Lynne A. Royer that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
4 Orinda Way
Suite 200-A
Orinda, CA 94563-2515
(925) 255-8500

Educational Background and Business Experience

Lynne Royer (born 1961) is a portfolio manager and co-head of the disciplined alpha team at Loomis Sayles. She has been at Loomis Sayles since 2010. Before joining Loomis Sayles, she was senior portfolio manager and co-head of the Montgomery Core fixed income team at Wells Capital Management. Prior to that, she was a lending officer with Morgan Guaranty Trust Company (J.P. Morgan). She previously held positions with Barclays de Zoete Wedd and Drexel Burnham Lambert. She is a Phi Beta Kappa graduate of Gettysburg College and earned an MBA from the Anderson Graduate School of Management at the University of California, Los Angeles.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Lynne is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Barath W. Sankaran

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Barath W. Sankaran that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Barath Sankaran (born 1980) is a member of the mortgage and structured finance team at Loomis Sayles. He is a co-portfolio manager for the dedicated agency MBS strategies and a co-agency MBS portfolio manager. He also guides other product teams at Loomis Sayles in the optimal sector allocation and portfolio implementation of agency MBS. He joined Loomis Sayles in 2009. He earned a BS from Carnegie Mellon University and an MBA from the Sloan School of Management at the Massachusetts Institute of Technology.

Barath holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Barath is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Ronald Schep

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Ronald Schep that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
Stadsplateau 7
3521 AZ Utrecht
The Netherlands
+31 30 8009223

Educational Background and Business Experience

Ronald Schep (born 1987) is a portfolio manager for the euro credit team at Loomis Sayles (Netherlands) B.V. He is responsible for co-managing the euro investment grade credit, sustainable euro investment grade credit and euro high yield credit strategies, with a focus on the construction and building materials. personal and household goods sectors and retail sectors. He joined Loomis Sayles in 2020 from Kempen Capital Management where he was a senior fixed income and derivatives trader. Previously, he was a derivatives trader at WEBB Traders and All Options. He earned an MSc in business economics from Erasmus University Rotterdam.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Ronald is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Jeffrey M. Schwartz

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Jeffrey M. Schwartz that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Additional information about Jeffrey M. Schwartz is available on the SEC's website at www.adviserinfo.sec.gov.

Loomis, Sayles & Company, L.P.
39533 Woodward Ave., Suite 300
Bloomfield Hills, MI 48304
(248) 646-2100

Educational Background and Business Experience

Jeffrey Schwartz (born 1963) is a portfolio manager at Loomis Sayles, where he co-manages the small cap value and small/mid cap core strategies. In addition to his portfolio management responsibilities, he also maintains primary research coverage for the utilities sector and the transportation industry. He has been with Loomis Sayles since 2012. Before joining Loomis Sayles, he was a senior portfolio manager for Palisade Capital Management, where he managed a small cap strategy. Prior to working at Palisade, he managed a small cap fund at Safeco Asset Management. From 1992 to 2001, he worked at Munder Capital Management, including a period co-managing their small cap and micro-cap portfolios. He earned a BA in mathematics from the State University of New York at Binghamton and an MBA from the University of Michigan.

Jeffrey holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Jeffrey is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Lynda L. Schweitzer

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Lynda L. Schweitzer that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Lynda Schweitzer (born 1963) is a portfolio manager and co-head of the global fixed income team at Loomis Sayles. She has been with Loomis Sayles since 2001. She earned a BA from the University of Rochester and an MBA from Boston University.

Lynda holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

In connection with Lynda's portfolio management duties and Loomis Sayles' registration as a Commodity Trading Adviser with the National Futures Association ("NFA"), she acts in the capacity of an "associated person" and holds a Series 3 National Commodity Futures license with the NFA.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Lynda is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Scott M. Service

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Scott M. Service that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

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One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Scott Service (born 1970) is a portfolio manager and co-head of the global fixed income team at Loomis Sayles. He has been with Loomis Sayles since 1995. He earned a BS from Babson College and an MBA from Bentley College.

Scott holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Scott is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Peter S. Sheehan

Brochure Supplement dated June 9, 2023

This brochure supplement provides information about Peter J. Sheehan that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Peter Sheehan (born 1983) is a portfolio manager on the full discretion team at Loomis Sayles. He co-manages the team's suite of high yield strategies. He is also a credit strategist focused on the bottom-up security selection process for the full discretion team. In this role, he works in concert with the senior research analysts and he oversees the underwriting and investment recommendation of the team's largest active weight positions.

Peter joined Loomis Sayles in 2012 from the MBA program at Boston College. Previously, he was an associate at CapX Partners, a Chicago-based private equity firm, specializing in lower middle market and stressed credit investing. He began his investment industry career in the credit training program at Bank of America/LaSalle Bank. He earned a BA from Vanderbilt University and an MBA from the Carroll School of Management at Boston College.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Peter is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

John J. Slavik

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about John J. Slavik that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

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One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

John Slavik (born 1968) is a co-portfolio manager of the specialty growth strategies at Loomis Sayles. He has been with Loomis Sayles since 2005. He is also a member of the CFA Society Boston. He earned a BA from the University of Connecticut.

John holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, John is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Edgardo Sternberg

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Edgardo Sternberg that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

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One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Eddy Sternberg (born 1959) is a co-portfolio manager of emerging markets debt portfolios at Loomis Sayles. He has been with Loomis Sayles since 2005. Eddy attended the Facultad de Ingenieria, Universidad de Buenos Aires where he received his engineering degree and earned an MBA from the Sloan School of Management at MIT.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Eddy is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Bradley Stevens

Brochure Supplement dated April 1, 2025

This brochure supplement provides information about Bradley Stevens that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
4 Orinda Way
Suite 200-A
Orinda, CA 94563-2515
(925) 255-8500

Educational Background and Business Experience

Brad Stevens (born 1978) is a Portfolio Manager and co-head of the disciplined alpha team at Loomis Sayles. Prior to being named co-head of the team, he was a credit Portfolio Manager on the team. He has been with Loomis Sayles since 2010. Brad earned a BA from Denison University and an MBA from Columbia Business School.

Brad holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Brad is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

LOOMIS | SAYLES

Thomas Stolberg

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Thomas Stolberg that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Tom Stolberg (born 1961) is a co-portfolio manager for the multi-asset credit strategies at Loomis Sayles. He has been with Loomis Sayles since 2008. He earned a BA from Middlebury College. He is a member of CFA Society Boston and the CFA Institute.

Tom holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Tom is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Harish Sundaresh

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Harish Sundaresh that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

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One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Harish Sundaresh (born 1983) is a portfolio manager at Loomis Sayles. As director of Loomis Sayles' systematic investing strategies team, he leads a team responsible for quantitative investing across all asset classes using advanced mathematical techniques. Prior to joining Loomis Sayles in 2010, he was a partner, director and portfolio manager at Armored Wolf. He earned a BS from Anna University, India and an SM from the Massachusetts Institute of Technology.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Harish is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Jennifer M. Thomas

Brochure Supplement dated May 14, 2021

This brochure supplement provides information about Jennifer M. Thomas that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Jennifer Thomas (born 1979) is co-portfolio on the mortgage and structured finance team and a senior analyst specializing in ABS with a focus on consumer ABS at Loomis Sayles. She is responsible for generating relative value trade ideas to help enhance portfolios and achieve investment objectives, and collaborating on structured product-related initiatives with client services and marketing. In addition, she has also supported the credit and research efforts in CMBS. She joined Loomis Sayles in 2007. Jennifer earned a BS from Bryant University and an MBA from Clark University.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Jennifer is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

Seth Timen

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Seth Timen that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
4 Orinda Way
Suite 200-A
Orinda, CA 94563-2515
(925) 255-8500

Educational Background and Business Experience

Seth Timen (born 1978) is a portfolio manager and co-head of the disciplined alpha team at Loomis Sayles. Seth joined Loomis Sayles in 2010 as a credit trader and was later promoted to senior credit trader. Previously, he was at Pequot Capital Management, where he was responsible for trading fixed income risk across investment grade, high yield, and structured products. Prior to Pequot Capital Management, he was an associate at Credit Suisse, where he assisted with corporate bond investment and strategy execution for institutional clients. He earned a BA from the University of Michigan.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Seth is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Pim van Mourik Broekman

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Pim van Mourik Broekman that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
Stadsplateau 7
3521 AZ Utrecht
The Netherlands
+31 30 8009223

Educational Background and Business Experience

Pim van Mourik Broekman (born 1974) is a director, co-head and member of the investment committee of the euro credit team and a portfolio manager at Loomis Sayles (Netherlands) B.V. He is responsible for co-managing the euro investment grade credit, sustainable euro investment grade credit and euro high yield credit strategies, with a focus on automotive, industrial goods and services and insurance sectors. Since 2000, he has held numerous credit analyst and portfolio management roles. He joined Loomis Sayles in 2020 from Kempen Capital Management where he was a senior portfolio manager for the euro credit team and member of its investment committee. Previously, he was the global head of credit research at APG Asset Management. Prior to this, he was a senior credit analyst at Lombard Odier Darier Hentsch & Cie and an investment and credit analyst at ABN AMRO Asset Management. He earned an MSc in agricultural economics from Wageningen University in the Netherlands, and a master of business in energy systems from the Delft TopTech School of Executive Education in the Netherlands.

Pim holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Pim is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Todd P. Vandam

Brochure Supplement dated January 12, 2021

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Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Todd Vandam (born 1970) is a portfolio manager on the full discretion team at Loomis Sayles. He co-manages a suite of high yield products, strategic alpha products and is the leader of the firm's high yield sector team. He has been with Loomis Sayles since 1994. He earned a BA from Brown University. He is a member of the CFA Society Boston.

Todd holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Todd is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Anand Vankawala

Brochure Supplement dated March 31, 2023

This brochure supplement provides information about Anand Vankawala that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Anand Vankawala (born 1984) is a member of the specialty growth strategies team at Loomis Sayles. He is a senior equity analyst for the small cap and small-mid cap growth products and a co-portfolio for the mid cap growth product. He joined Loomis Sayles in 2017. Prior to joining Loomis Sayles, he was at Century Capital Management, first as a junior equity analyst and later as a senior equity analyst. He earned a BS from the Illinois Institute of Technology and an MS from Vanderbilt University.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Anand is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Peter C. Yanulis

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Peter C. Yanulis that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Peter Yanulis (born 1985) is a co-portfolio manager for the emerging market debt blended total return strategy and an associate portfolio manager for the world credit asset strategy at Loomis Sayles. He is also a multi-asset credit strategist for the alpha strategies group, focusing primarily on global emerging markets, portfolio construction and risk premia. He joined Loomis Sayles in 2015 as a research analyst covering emerging market sovereigns. Previously, he was at JP Morgan in a number of roles, but most recently as vice president on the emerging markets trading desk. Prior to this, he was an analyst in the asset management graduate training program and, before that, an analyst in G-10 interest rate derivatives trading. He began his career as an analyst in FX options trading at State Street Global Markets. He earned a BA from Boston University and an MA from Columbia University.

Disciplinary Information

Not Applicable.

Other Business Activities

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Peter is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Heather M. Young

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Heather M. Young that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
One Financial Center
Boston, MA 02111
(800) 343-2029

Educational Background and Business Experience

Heather Young (born 1983) is a portfolio manager on the full discretion team managing the bank loan strategies at Loomis Sayles. Additionally, she serves as a strategist for the team, focused on bank loans. She joined Loomis Sayles in 2008 as a research analyst covering loans, high yield, investment grade, and emerging markets credits until 2011. After earning her graduate degree, she worked as an early-state technology investor for Converge Venture Partners. Later, she was a senior analyst for ESG-forward investment grade bond manager for Breckinridge Capital Advisors until 2016 when rejoined Loomis Sayles as a senior bank loan analyst. She became a strategist in 2018 and was promoted to portfolio manager in 2020. She earned a BA from Boston University and an MBA from the Massachusetts Institute of Technology.

Heather holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Heather is subject to the Peer Review Process. She is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.

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Marco Zanotto

Brochure Supplement dated January 12, 2021

This brochure supplement provides information about Marco Zanotto that supplements Loomis, Sayles & Company, L.P.'s ("Loomis Sayles") brochure. You should have received a copy of that brochure. Please contact Loomis Sayles' Client Intake group if you did not receive Loomis Sayles' brochure or if you have questions about the content of this supplement.

Loomis, Sayles & Company, L.P.
Stadsplateau 7
3521 AZ Utrecht
The Netherlands
+31 30 8009223

Educational Background and Business Experience

Marco Zanotto (born 1993) is a portfolio manager for the euro credit team at Loomis Sayles (Netherlands) B.V. He is responsible for co-managing the euro investment grade credit, sustainable euro investment grade credit and euro high yield credit strategies, with a focus on the food and beverage, travel and leisure and utilities sectors. He joined Loomis Sayles in 2020 from Kempen Capital Management where he was a portfolio manager for the euro credit team. Prior to becoming a portfolio manager, he was an investment banking analyst at Kempen & Co. Marco earned a BA in economics and business administration from the Universita degli Studi di Trieste and a MSc in finance from the Universita degli Studi di Trento, and an MSc in financial economics from Erasmus University Rotterdam.

Marco holds the designation of Chartered Financial Analyst ("CFA"). To earn the CFA designation, an individual must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program, which is a graduate-level self-study program.

Disciplinary Information

Not Applicable.

Additional Compensation

Not Applicable.

Supervision

As a portfolio manager, Marco is subject to the Peer Review Process. He is supervised by David Waldman, Loomis Sayles' chief investment officer, or his designee, who can be reached at 1-800-343-2029.