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| Investment Objective | The Loomis Sayles Global Growth Equity strategy investment objective is to outperform the relevant benchmark and deliver performance that falls within the top quartile of global equity managers over a market cycle. |
| Primary Investments | Investing in leading global larger companies with high earnings growth potential can produce excellent long-term returns. |
| Style | Global Growth Equities - Concentrated portfolio. |
| Investment Philosophy | <p>Bottom-up investment process, focusing on the fundamentals of the individual companies, not countries. Portfolio size 40 to 50 stocks.</p> <p>The manager seeks to own the top fundamentally sound global companies that exhibit greater than 20% growth p.a.</p> |
| Process | <p>The portfolio is constructed by identifying the strongest growth candidates, globally with country selection playing a limited role. Employing Loomis Sayles' proprietary research, the portfolio managers invest in companies exhibiting:</p> <ul style="list-style-type: none"> ▶ strong earnings growth and accelerating or above average revenue growth potential ▶ characteristics of industry leadership such as increasing market share and rising profit margins ▶ strong management with ownership stakes and a focus on shareholder value ▶ under appreciated growth potential as identified by DCF analysis. |
| Portfolio Fit | Would suit a global equity strategy looking for a high Growth style portfolio to complement value strategies. A focus on quality larger capitalisation stocks with higher alpha and volatility characteristics. |
| Currency | Unhedged. |
| Management Fees | Available upon request. |
| Vehicle | Mandate. |
| Investment Manager | Loomis, Sayles & Company L.P. |
| Portfolio Team | A team of four growth portfolio managers, with 13 equity analysts and five equity traders supporting them. The portfolio management team has managed growth portfolios for many years through all market conditions. |