

## LOOMIS SAYLES ANNOUNCES RETIREMENT OF LONGTIME RELATIVE RETURN PORTFOLIO MANAGER KURT WAGNER, PROMOTION OF DANIEL CONKLIN

- Kurt Wagner, portfolio manager on the relative return team, retired in August 2020 after over 40 years in the industry, 26 with Loomis Sayles
- Daniel Conklin, CFA elevated to portfolio manager as of June 2020

**BOSTON (September 8, 2020)** – Loomis, Sayles & Company, an affiliate of Natixis Investment Managers, announced today that Kurt Wagner, portfolio manager on the relative return team, retired in August 2020 after 26 years with the company and over four decades in the industry. As co-portfolio manager of the Loomis Sayles Core Fixed Income, Intermediate Duration Fixed Income, Short Duration Fixed Income and Investment Grade Corporate Bond strategies, Kurt played a critical role in helping develop and execute the team’s investment philosophy and process, while delivering strong performance to clients.

In preparation for Kurt’s retirement, Daniel Conklin was added as a portfolio manager for the Loomis Sayles Core Fixed Income, Intermediate Duration Fixed Income and Short Duration Fixed Income strategies as well as associated mutual funds, separately managed accounts and the team’s ETF (effective June 30, 2020). Dan was previously named an associate portfolio manager on these strategies in September 2019 when Kurt announced his retirement plans. Dan joins experienced co-portfolio managers Chris Harms and Cliff Rowe, who together have an average of over three decades in the industry and joined Loomis Sayles in 2010 and 1992 respectively.

Dan joined the relative return team as an investment analyst in 2014 and was promoted to senior investment analyst in 2018. Previously, he was a middle office analyst at Putnam Investments, supporting the firm’s derivative collateralization process. Dan earned a BS from the University of Massachusetts, Lowell and an MS in Finance from Northeastern University.

“Kurt was integral to the growth and success of the core and corporate fixed income strategies and he always brought valuable investment insights. We will miss Kurt as a colleague and friend and thank him for his contributions through the years, especially as a valuable mentor to the junior members of the relative return team,” said Rick Raczkowski, executive vice president and co-head of the relative return team. “We are also thrilled to elevate Dan, a skilled investor who has demonstrated talent in portfolio construction and implementation, process design and improvement, and in the evaluation of investment ideas and risk analysis. We look forward to this team’s next chapter.”

Long-standing portfolio managers Rick Raczkowski and Carol Embree, who co-managed the Investment Grade Corporate Bond strategies with Kurt, will manage those portfolios as a duo.

**CONTACT:**  
Orla O’Brien  
(617)478-7480  
[oobrien@loomissayles.com](mailto:oobrien@loomissayles.com)

## DANIEL CONKLIN, CFA

Dan Conklin is a vice president of Loomis, Sayles & Company, and a portfolio manager for the relative return team. He co-manages the Loomis Sayles Intermediate Duration Bond and Limited Term Government & Agency funds, as well as the Natixis Loomis Sayles Short Duration Income ETF. Dan also co-manages the Loomis Sayles Core Fixed Income, Short Duration Fixed Income and Intermediate Duration Fixed Income strategies.

Dan has 10 years of investment industry experience and 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. Previously, Dan was a middle office analyst at Putnam Investments, supporting the firm's derivative collateralization process.

Dan earned a BS from the University of Massachusetts, Lowell and an MS in Finance from Northeastern University.

## ABOUT LOOMIS SAYLES

Since 1926, Loomis, Sayles & Company has helped fulfill the investment needs of institutional and mutual fund clients worldwide. The firm's performance-driven investors integrate deep proprietary research and integrated risk analysis to make informed, judicious decisions. Teams of portfolio managers, strategists, research analysts and traders collaborate to assess market sectors and identify investment opportunities wherever they may lie, within traditional asset classes or among a range of alternative investments. Loomis Sayles has the resources, foresight and the flexibility to look far and wide for value in broad and narrow markets in its commitment to deliver attractive sustainable returns for clients. This rich tradition has earned Loomis Sayles the trust and respect of clients worldwide, for whom it manages \$310.9 billion \*\* in assets (as of June 30, 2020).

*\*\*Includes the assets of Loomis, Sayles & Co., LP, and Loomis Sayles Trust Company, LLC. Loomis Sayles Trust Company is a wholly owned subsidiary of Loomis, Sayles & Company, LP.*

## ABOUT NATIXIS INVESTMENT MANAGERS

Natixis Investment Managers serves financial professionals with more insightful ways to construct portfolios. Powered by the expertise of more than 20 specialized investment managers globally, we apply Active Thinking® to deliver proactive solutions that help clients pursue better outcomes in all markets. Natixis Investment Managers ranks among the world's largest asset management firms<sup>1</sup> with \$908.9 billion / €828.4 billion assets under management.<sup>2</sup>

Natixis Investment Managers includes all of the investment management and distribution entities affiliated with Natixis Distribution, L.P. and Natixis Investment Managers S.A. Services/ products are not available to all investors in all jurisdictions.

<sup>1</sup>*Cerulli Quantitative Update: Global Markets 2019 ranked Natixis Investment Managers as the 17th largest asset manager in the world based on assets under management as of December 31, 2018.*

<sup>2</sup>*Assets under management ("AUM") as of March 31, 2020. AUM, as reported, may include notional assets, assets serviced, gross assets, assets of minority-owned affiliated entities and other types of non-regulatory AUM managed or serviced by firms affiliated with Natixis Investment Managers.*

**Natixis Distribution L.P. (fund distributor FINRA | SIPC) and Loomis, Sayles & Company, L.P. are affiliated.**

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