

SHANNON O'MARA PROMOTED TO CO-DIRECTOR, CREDIT RESEARCH; NAMED ONE OF PENSIONS & INVESTMENTS 2024 INFLUENTIAL WOMEN IN INSTITUTIONAL INVESTING

- Shannon, who was previously associate director of credit research, joins Chris Gootkind, CFA, who has led the credit research team since 2010, as co-director.
- Earlier this month, *Pensions & Investments* recognized Shannon's leadership, contributions and impact in the industry by naming her one of its 2024 Influential Women in Institutional Investing.

BOSTON (23 SEPTEMBER 2024) – Loomis, Sayles & Company, the global investment manager with \$359.7 billion in assets under management as of 30 June 2024, is pleased to announce that Shannon O'Mara, CFA, has been promoted to co-director of credit research. She joins Chris Gootkind, CFA, who has led the credit research team since 2010 and will continue as co-director. Together, they will oversee the team and its strategic direction, and Shannon will retain her responsibilities as senior analyst covering the home construction and building materials industries.

Loomis Sayles has long been known for its deep proprietary research expertise across global asset classes and market sectors. The firm's credit research team provides fixed income investment teams with essential market and issuer-specific insights that support them in making informed decisions as they pursue attractive, sustainable returns for clients. Credit analysts provide independent forward-looking assessments of credit risk and relative value opportunities based on rigorous bottom-up fundamental analysis and insights.

"Shannon has an outstanding reputation as a credit analyst and has been a trusted partner to investment teams since joining the firm," said David Waldman, chief investment officer. "Her leadership has been integral to the credit research team's ongoing evolution as well as to Loomis Sayles overall as the founder of our Undergraduate Women's Investment Network (UWIN)."

A key component of the firm's talent management pipeline, Shannon launched the UWIN internship and mentorship program in 2015 to address the lack of diverse representation in recruiting pools for junior level research positions. To date, the UWIN program has served more than 250 undergraduates representing almost two dozen schools in the New England area. Today, 13 Loomis Sayles employees are graduates of the UWIN program.

On 12 September 2024, *Pensions & Investments* honored Shannon's leadership, contributions and impact in the industry by naming her one of its 2024 Influential Women in Institutional Investing and highlighted the UWIN program among her accomplishments.

"As associate director since 2015, Shannon has been a terrific partner to me in managing our global credit research team," said Chris. "I'm delighted to have her to join me as co-director."

Shannon began her investment industry career in 1993 and joined Loomis Sayles in 1998. In 2019, Shannon was recognized by InvestmentNews as a Women to Watch honoree. Prior to Loomis Sayles, Shannon was a credit risk manager and lending officer at JP Morgan. She earned a BA in economics from

the University of Rochester and management certificates in finance and accounting from the Simon Business School at the University of Rochester.

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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 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, risk-adjusted returns for clients. This rich tradition has earned Loomis Sayles the trust and respect of clients worldwide, for whom it manages \$359.7 billion* in assets (as of 30 June 2024).

**Includes the assets of both Loomis, Sayles & Co., LP, and Loomis Sayles Trust Company, LLC. (\$43.8 billion for the Loomis Sayles Trust Company). Loomis Sayles Trust Company is a wholly owned subsidiary of Loomis, Sayles & Company, L.P.*

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