

RESEARCH AND STOCK SELECTION ARE VITAL TO CONSISTENT RETURNS, IML AND LOOMIS SAYLES SAY

SYDNEY (10 September 2019) – The importance of an active, research-led approach to managing equity portfolios is especially important during times of market volatility, whether it comes from US-China trade tensions, Brexit or other global developments. A clear investment philosophy with a disciplined approach to stock selection is an important tool to help achieve the desired long-term returns for investors.

Investors Mutual Limited (IML) Investment Director Anton Tagliaferro and IML Portfolio Manager Daniel Moore will join Lee Rosenbaum, co-Portfolio Manager of the Loomis Sayles Global Equity Fund, in a series of adviser events to discuss how they go about uncovering opportunities in sharemarkets in Australia and around the world.

In collaboration with IML, global active manager Loomis, Sayles & Company L.P. (Loomis Sayles) launched the Loomis Sayles Global Equity Fund (the Fund) to the Australian retail market in November 2018.

IML's Mr Tagliaferro said the current high level of market volatility requires a disciplined approach to stock selection based on fundamental research.

"Low interest rates have driven many segments of the market into overvalued territory," Mr. Tagliaferro said.

"IML has always sought to invest in good quality stocks at what we believe is a reasonable price. That has always been consistent with our strategy for delivering solid, long-term returns and reliable income streams for our clients over the longer term," he said.

"When it comes to a global perspective, the Loomis Sayles investment team has a long track record of managing global equity portfolios using in-depth market knowledge based on fundamental research, and we're pleased to have Lee in Australia to update advisers on the Loomis Sayles approach to global investing," Mr Tagliaferro said.

Loomis Sayles' Mr Rosenbaum co-manages the Fund with Eileen Riley. He is visiting Melbourne, Brisbane and Sydney this week to discuss the Fund's strategy and, in particular, its relevance in current markets.

"We continue to seek and own quality companies that can grow their intrinsic value over time and that are attractively valued. Market noise and a shorter-term focus provide opportunities as we research companies that represent long-term value." Mr Rosenbaum said.

"As active managers with a disciplined investment approach, we don't overly concern ourselves with macro events – which we can't control anyway. We view volatility as a potential source for opportunities," he said.

The Loomis Sayles Global Equity Fund is available to advisers on the Asgard, BT, BT Panorama, Netwealth and Hub24 platforms. It has also received strong interest from advisers ahead of the IML-hosted roadshow featuring Loomis Sayles Global Equity Fund Portfolio Manager Lee Rosenbaum the week of 9 September 2019.

The Loomis Sayles Global Equity Fund has been awarded a Zenith 'Recommended' rating and a 4-star 'Superior' rating from SQM research.

Founded in 1926, Loomis Sayles manages over US\$250 billion in assets for clients worldwide. The Fund offers Australian advisers and investors the benefits of Loomis Sayles' attractive, sustainable returns through its proprietary approach to stock-picking which is unconstrained by a company's size, industry or location.

For more information on the fund, please visit <https://www.loomissayles.com.au/>

FOR MORE INFORMATION OR TO ARRANGE AN INTERVIEW, CONTACT:

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ABOUT LOOMIS SAYLES

The Loomis Sayles Global Equity Fund offers investors a disciplined, bottom-up, unconstrained approach to global equity investing. Investors Mutual Ltd (AFSL 229988) is the issuer of and Responsible Entity for the Fund.

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 US\$287.7 billion* in assets (as of June 30, 2019).

**Includes the assets of both Loomis, Sayles & Co., LP, and Loomis Sayles Trust Company, LLC. (\$22.0 billion for the Loomis Sayles Trust Company). Loomis Sayles Trust Company is a wholly owned subsidiary of Loomis, Sayles & Company, L.P.*

ABOUT IML

Investors Mutual Limited is (IML) is a boutique Australian Equities Fund Manager, established in 1998 by Anton Tagliaferro.

IML has a conservative investment style with a long-term focus and aims to deliver consistent returns for clients. IML achieves this through the disciplined application of a fundamental, quality and value-based approach to investing.

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This information should not be relied upon in determining whether to invest in the Fund and is not a recommendation to buy, sell or hold any financial product, security or other instrument. In deciding whether to acquire or continue to hold an investment in the Fund, an investor should consider the Fund's product disclosure statement, available on the website www.loomissayles.com.au or by contacting us on 1300 157 862. Past performance is not a reliable indicator of future performance.

Investment in the Fund are not a deposit with, or other liability of, Investors Mutual Limited and are subject to investment risk, including possible delays in repayment and loss of income and principle invested. Investors Mutual Limited does not guarantee the performance of the Fund or any particular rate of return.

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