

Natixis Investment Managers Funds Earn 2024 US LSEG Lipper Fund Awards

BOSTON, March 20, 2024 – Natixis Investment Managers today announced that funds managed by several of its affiliate investment management firms – Harris Associates/Oakmark Funds, Natixis Advisors and WCM Investment Management – earned 2024 LSEG Lipper Fund Awards for the US. The funds were recognized for achieving consistently strong risk-adjusted performance relative to their peers for the period ending November 30, 2023. LSEG announced award and certificate recipients on March 14, 2024, which included the following from the Natixis Investment Managers mutual fund family:

- **Oakmark Equity and Income, Institutional Class [OANBX]** – Ranked best Mixed-Asset Target Allocation Moderate Fund for the three-year period (127 eligible US funds, 544 share classes).
- **Natixis Oakmark Fund, N Class [NOANX]** – Ranked best Mid-Cap Value Fund for the five-year period (174 eligible US funds, 542 share classes).
- **WCM Focused International Growth Fund, Institutional Class [WCMIX]** – Ranked best International Large-Cap Growth Fund for the 10-year period (51 eligible US funds, 198 share classes).

“We applaud the portfolio management teams at Harris Associates/Oakmark Funds and WCM for once again earning LSEG Lipper Fund Awards,” said David Giunta, CEO of Natixis Investment Managers in the US. “These accolades are a testament to the strength of each firm’s unique investment process and their commitment to generating long-term performance for investors.”

About LSEG Lipper Fund Awards

The LSEG Lipper Fund Awards, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers. The LSEG Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is an objective, quantitative, risk-adjusted performance measure calculated over 36, 60 and 120 months. The fund with the highest Lipper Leader for Consistent Return (Effective Return) value in each eligible classification wins the LSEG Lipper Fund Award. For more information, see lipperfundawards.com. Although LSEG Lipper makes reasonable efforts to ensure the accuracy and reliability of the data used to calculate the awards, their accuracy is not guaranteed. LSEG Lipper Fund Awards, ©2024 LSEG. All rights reserved. Used under license.

The Lipper Fund Awards Methodology:

The merit of the winners is based on objective, quantitative criteria. The influential and prestigious LSEG Lipper Fund Awards are based on our Lipper Leaders Rating for Consistent Return. Individual classifications of three, five, and 10-year periods, as well as fund families with high average scores for the three-year period, are also recognized. The awards are based on LSEG Lipper’s proven proprietary methodology, which can be viewed [here](#).

About Natixis Investment Managers

Natixis Investment Managers’ multi-affiliate approach connects clients to the independent thinking and focused expertise of more than 15 active managers. Ranked among the world’s largest asset managers¹ with more than \$1.2 trillion assets under management² (€1.1 trillion), Natixis Investment Managers delivers a diverse range of solutions across asset classes, styles, and vehicles, including innovative environmental, social, and governance

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(ESG) strategies and products dedicated to advancing sustainable finance. The firm partners with clients in order to understand their unique needs and provide insights and investment solutions tailored to their long-term goals.

Headquartered in Paris and Boston, Natixis Investment Managers is part of the Global Financial Services division of Groupe BPCE, the second-largest banking group in France through the Banque Populaire and Caisse d'Épargne retail networks. Natixis Investment Managers' affiliated investment management firms include AEW; DNCA Investments;³ Dorval Asset Management; Flexstone Partners; Gateway Investment Advisers; Harris Associates/Oakmark Funds; Investors Mutual Limited; Loomis, Sayles & Company; Mirova; MV Credit; Naxicap Partners; Ossiam; Ostrum Asset Management; Seventure Partners; Thematics Asset Management; Vauban Infrastructure Partners; Vaughan Nelson Investment Management; and WCM Investment Management. Additionally, investment solutions are offered through Natixis Investment Managers Solutions and Natixis Advisors, LLC. **Not all offerings are available in all jurisdictions.** For additional information, please visit Natixis Investment Managers' website at im.natixis.com | LinkedIn: [linkedin.com/company/natixis-investment-managers](https://www.linkedin.com/company/natixis-investment-managers).

Natixis Investment Managers' distribution and service groups include Natixis Distribution, LLC, a limited purpose broker-dealer and the distributor of various US registered investment companies for which advisory services are provided by affiliated firms of Natixis Investment Managers, Natixis Investment Managers S.A. (Luxembourg), Natixis Investment Managers International (France), and their affiliated distribution and service entities in Europe and Asia.

Before investing, consider the fund's investment objectives, risks, charges, and expenses. Visit im.natixis.com or call 800-225-5478 for a prospectus or a summary prospectus containing this and other information. Read it carefully.

All investing involves risk, including the risk of loss. Investment risk exists with equity, fixed income, and alternative investments. There is no assurance that any investment will meet its performance objectives or that losses will be avoided.

Natixis Distribution, LLC is a marketing agent for the Oakmark Funds, a limited purpose broker-dealer and the distributor of various registered investment companies for which advisory services are provided by affiliates of Natixis Investment Managers. Member FINRA | SIPC

¹ Cerulli Quantitative Update: Global Markets 2023 ranked Natixis Investment Managers as the 17th largest asset manager in the world based on assets under management as of December 31, 2022.

² Assets under management ("AUM") of current affiliated entities measured as of December 31, 2023 are \$1,288.6 billion (€1,166.5 billion). 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.

³ A brand of DNCA Finance.

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