

Loomis, Sayles & Company

Locations: Massachusetts (HQ)
Industries: Diversified Financials

RISK LEVEL:



Medium Risk

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DESCRIPTION:

Loomis, Sayles, & Company often yields to political activism in shaping corporate governance, potentially alienating consumers, dividing employees, and harming shareholders. The company implements race and identity-based policies that replace merit, excellence, and integrity with preferential treatment and outcomes. Loomis Sayles occasionally embraces corporate initiatives that redirect its central focus from business goals to partisan policies and divisive issues at times. This approach fails to safeguard free exercise, free speech, and free enterprise.

Corporate Weaponization

Has canceled customers, suppliers, or vendors due to their political views or religious beliefs OR corporately boycotts, divests, or sanctions regions, people groups, or industries. Medium Risk

Loomis Sayles integrates ESG into all of its business practices. Loomis Sayles stated, "we believe the best way to consider ESG is through integration that aims to identify the financial materiality of ESG factors." (1)(2). Loomis Sayles is a signatory of the Principles for Responsible Investment, incorporating ESG issues into investment analysis, decision-making, and other business practices (3)(4). However, Loomis Sayles has not publicly canceled customers, suppliers, or vendors based on political views or religious beliefs (5).

Charitable giving (including employee matching programs) policies or practices discriminate against charitable organizations based on views or religious beliefs. Lower Risk

Loomis Sayles does not appear to discriminate against charitable organizations based on views or beliefs (1).

Employment policies fail to protect against viewpoint or other discrimination and/or are ideological in nature. High Risk

Loomis Sayles offers DEI training to its employees (1). Loomis Sayles does not provide viewpoint protections for its employees (2).

Corporate Governance and Public Policy

Uses corporate reputation to support causes, organizations, or policies hostile to freedom of expression. **High Risk**

Loomis Sayles is a member of Climate Action 100+, committed to carbon neutrality by 2050 (1)(2). The company is a signatory to the CFA Institute's Diversity, Equity, and Inclusion Code, indicating its support of DEI in its recruitment, hiring, onboarding, and promotions. Furthermore, the company pledges to integrate DEI into its policies, promote DEI in the investment industry, and provide regular reporting on its DEI metrics to the CFA Institute (3)(4)(5). Loomis Sayles supports DEI within its business practices, employing a DEI Officer (6).

Uses corporate funds to advance ideological causes, organizations, or policies hostile to freedom of expression. **Lower Risk**

Loomis Sayles has not used corporate funds to advance ideological causes, organizations, or policies (1)(2).

Uses corporate political actions and/or financial contributions for ideological, non-business purposes. **N/A**

Loomis Sayles does not operate a PAC and has not reported on its lobbying at this time (1)(2)(3).

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