

New York Life Investment Management LLC (NYLIM)

MackKay Shields LLC Overview

MackKay Shields is a growing and diversified firm

Founded in 1938, MackKay Shields LLC (MackKay Shields) has grown steadily over the years through rapidly changing market environments. They became a registered investment advisor in 1969 and expanded their services over time. MackKay Shields now offer products across the full range of domestic and international equity and fixed income management.

In 1984, MackKay Shields became a wholly owned, fully autonomous subsidiary of New York Life Insurance Company, a premier financial services provider and one of the country's most highly rated insurance companies. To capitalize on MackKay Shields' broad range of investment management and retirement plan services, New York Life formed New York Life Investment Management LLC (NYLIM) in 2000. With this change, today MackKay Shields is an affiliate of NYLIM.

Investment Philosophy

A disciplined philosophy, consistently applied to all portfolios

MackKay Shields' mission is to assist clients in meeting their investment objectives by managing their assets with proven, disciplined investment strategies. Stability, performance, and service are essential components of the philosophy and part of the commitment made to each client.

Market Expertise

Broad market expertise, insights on individual securities

As a multi-product firm, MackKay Shields offers extensive expertise across the capital markets. They provide a robust and diversified menu of actively managed investment styles across the domestic and international equity, balanced, and fixed income spectrum.

Equity

Growth (Large, Mid, Small and Small/Mid Cap); Value (Large and Mid Cap)

Fixed Income

Core Plus, Core, Core Investment Grade, High Yield, Enhanced Money Market, Intermediate and Short Term and Government/Corporate

Balanced

Balanced Growth, Balanced Value and Balanced

Please keep in mind that investment objectives may not be met as the underlying investment options are subject to market risk and fluctuate in value.