

# Advisory Blog

Timely insights on the issues that matter most to advisors and their clients

## Disclosure



*The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness. Past performance is no guarantee of future results.*

## LATEST INSIGHTS

[Fed](#) | [Inflation](#) | [Markets and Economy](#)  
| [Rates](#)

### [The Fed Tries to Get Ahead of the Market](#)

By: [Jim Caron](#) | September 21, 2022

**New York** - The 75 basis point (bps) rate hike came as expected, but one surprise was the 100 bps markup in end-of-year policy rates to 4.4% from 3.4%.

[READ THE BLOG POST](#)

[Charitable Giving](#) | [Taxes](#)

### [Combine a Roth Conversion with a Charitable Giving Strategy](#)

By: [Eileen Tam](#) | September 20, 2022

**Boston** - One of the most important considerations when selecting between a traditional individual retirement account (IRA) and a Roth IRA is whether an investor's tax rate will be higher or lower in retirement. Clients who believe their income will be higher in the future may want to convert into a Roth IRA — but the conversion should be planned within a holistic investment strategy.

[READ THE BLOG POST](#)

[Fed](#) | [Investment Grade Fixed Income](#)  
| [Rates](#)

### [When MBS Benchmarks Go Low, Active MBS Managers Go High](#)

By: [Andrew Szczurowski, CFA](#), [Chip Driscoll, CFA](#) | September 19, 2022

**Boston** - When we borrow Michelle Obama's famous catchphrase, we aren't talking about politics in the run-up to the midterm elections. What we mean is that active investors may be able to capture attractive opportunities by migrating up in coupon in the agency mortgage-backed securities (MBS) market.

[READ THE BLOG POST](#)



## All Articles (4)

[Fed](#) | [Inflation](#) | [Markets and Economy](#) | [Rates](#)  
[The Fed Tries to Get Ahead of the Market](#)

By: *Jim Caron* | *September 21, 2022*

**New York** - The 75 basis point (bps) rate hike came as expected, but one surprise was the 100 bps markup in end-of-year policy rates to 4.4% from 3.4%.

[READ MORE](#)



Jim Caron  
Portfolio Manager and  
Chief Fixed Income  
Strategist  
Multi-Sector Fixed  
Income

---

[Fed](#) | [Investment Grade Fixed Income](#) | [Rates](#)  
[When MBS Benchmarks Go Low, Active MBS Managers Go High](#)

By: *Andrew Szczurowski, CFA* | & *Chip Driscoll, CFA* | *September 19, 2022*

**Boston** - When we borrow Michelle Obama's famous catchphrase, we aren't talking about politics in the run-up to the midterm elections. What we mean is that active investors may be able to capture attractive opportunities by migrating up in coupon in the agency mortgage-backed securities (MBS) market.

[READ MORE](#)



Andrew Szczurowski,  
CFA  
Head of Agency MBS  
Global Fixed Income



Chip Driscoll, CFA  
Institutional Portfolio  
Manager  
Eaton Vance  
Management

---

[Fed](#) | [Inflation](#) | [Markets and Economy](#) | [Rates](#)  
[EV Forward: Mixed Signals in the Market? Consider a Barbell Approach for Bonds](#)

By: *EV Forward* | *August 2, 2022*

**New York** - Data series in the market are at odds with each other, sending mixed signals to investors depending on whether they consider inflation — a lagging indicator — or sentiment and survey data on economic activity, which are more forward-looking measures.



EV Forward

[Fed](#) | [Inflation](#) | [Markets and Economy](#) | [Rates](#)

## [Fed Signals Possible Slowdown in Rate Hikes as Economy Cools](#)

By: *Eric Stein, CFA* | July 28, 2022

**Boston** - As expected, the Federal Open Market Committee (FOMC) raised its fed funds target by 75 basis points (bps) to 2.5% at its meeting on July 27. But the big news came from the commentary of Fed Chair Jerome Powell, which was taken by the market as quite dovish.

[READ MORE](#) ▼



Eric Stein, CFA  
Chief Investment Officer  
Fixed Income  
Eaton Vance  
Management



**HEADQUARTERS**  
Two International Place  
Boston, MA 02110

### [Investments](#)

- [Eaton Vance Funds](#)
- [Parametric Funds](#)
- [Calvert Funds](#)
- [Separately Managed Accounts](#)
- [Closed-End Funds and Term Trusts](#)

### [Insights](#)

- [Advisory Blog](#)
- [Monthly Market Monitor](#)
- [Market Update](#)
- [Events](#) Content for Investment Professionals only
- [The Advisor Institute](#)

### [Taxes & Tools](#)

- [Investment Tax Center](#)
- [Tax Information](#)
- [Investment Tax Calculator](#)
- [Laddered Investing Interest Rate Scenario Tool](#)
- [Concentrated Stock Position Calculator](#)
- [Tax-Equivalent Yield Calculator](#)

### [Resources](#)

- [Forms & E-Delivery](#)
- [Mutual Funds & Abandoned Property](#)
- [DST Vision](#)
- [AdvisorCentral](#)

To report a website vulnerability, please go to [Responsible Disclosure](#).

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

For USA PATRIOT Act Disclosure Notice please click [here](#).

This image indicates content designed specifically for Financial Advisors / Investment Professionals. This material is not to be used with the public.

Before investing in any Eaton Vance fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. For

open-end mutual funds, the current prospectus contains this and other information. To obtain a mutual fund prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). Read the prospectus carefully before you invest or send money. For closed-end funds, you should contact your financial advisor. To obtain the most recent annual and semi-annual shareholder report for a closed-end fund contact your financial advisor or [download a copy here](#). Before purchasing any variable product, consider the objectives, risks, charges, and expenses associated with the underlying investment option(s) and those of the product itself. For a prospectus containing this and other information, contact your investment or insurance professional. Read the prospectus carefully before investing.

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision.

The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

© Eaton Vance Management. All rights reserved. Eaton Vance open-end mutual funds are offered through Eaton Vance Distributors, Inc. Two International Place, Boston, MA 02110. Member [FINRA](#) / [SIPC](#)

Publication details: Thursday, June 23, 2022 11:21 AM

Page ID: 22944 - <https://funds.eatonvance.com/advisory-blog.php>