



Separately Managed Accounts

Our SMAs offer high-net-worth investors personalized strategies, flexibility and tax efficiency.

We are the largest SMA manager in the US.*

Since 1998, we've been providing customized investment strategies for SMA investors.

Featured SMA strategies

Parametric Custom Core

Market-like equity returns, active tax management and customization

[STRATEGY OVERVIEW](#)

[Parametric Custom Core Solutions](#)

Parametric TABS Municipal Ladders

Focused on maximizing after-tax income and managing interest rate risk

[STRATEGY OVERVIEW](#)

[Municipal Bond Market Insight](#)

[Parametric Laddered Bond Strategies](#)

Calvert U.S. Small Cap Strategy

Offers exposure to a diversified portfolio of quality U.S. companies judged to be adequately managing their material ESG risks and opportunities.

[STRATEGY OVERVIEW](#)

Atlanta Capital High Quality SMID-Cap

Seeks long-term growth by investing in high-quality U.S. small- and mid-cap stocks

[STRATEGY OVERVIEW](#)

[Visit our High-Net-Worth Investing Center for customized planning for the unique demands that affluence brings.](#)



Tools



[Parametric Advisor Tools](#)



[Investment Tax Calculator](#)



[Laddered Investing Interest
Rate Scenario Tool](#)

Explore all of our separately managed strategies

We offer a full range of separately managed strategies that you won't find everywhere- including equity, fixed income, multi-asset, responsible investing and alternatives.

Equity



We offer active and index-based strategies for U.S., non-U.S. and global portfolios across a full range of market capitalizations and investment styles.

[Atlanta Capital High Quality Calvert Equity](#)

[Atlanta Capital High Quality Focused Growth](#)

[Atlanta Capital High Quality Growth Plus](#)

[Atlanta Capital High Quality Select Equity](#)

[Atlanta Capital High Quality Small Cap*](#)

[Atlanta Capital High Quality SMID Cap*](#)

[Calvert International Equity \(ADR\)](#)

Calvert International Responsible Index

Calvert Mid Cap

Calvert Small/Mid Cap

Calvert U.S. Large-Cap Core Responsible Index

Calvert U.S. Large-Cap Growth Responsible Index

Calvert U.S. Large-Cap Value Responsible Index

Calvert U.S. Mid-Cap Core Responsible Index

[Calvert U.S. Small Cap](#)

Calvert's ESG Research Global Developed Markets Equity Leaders

Calvert's ESG Research Global ex-U.S. Developed Markets Equity Leaders

Calvert's ESG Research U.S. Large-Cap Equity Leaders

Eaton Vance Focused Growth Opportunities

[Eaton Vance Focused Value Opportunities](#)

[Eaton Vance Large-Cap Growth](#)

[Eaton Vance Large-Cap Value](#)

Eaton Vance Mid-Cap Value

Eaton Vance U.S. Small-Cap Equity

[Parametric Custom Core Fixed Income](#)

[Parametric Custom Core®](#)

[Parametric Dividend Income](#)

[Parametric Enhanced Income Core](#)

[Parametric Enhanced Income Tax-Advantaged Core](#)

Parametric International Equity

*This strategy is closed to new investors.

Fixed Income



Active management, in-depth fundamental research and downside risk management are at the core of our fixed-income approach.

Calvert Managed Municipal

Calvert Municipal Ladders

Calvert U.S. Corporate Ladders

Eaton Vance Preferred Security

[Parametric TABS Managed Municipal – Short \(Tax-Managed\)](#)

[Parametric TABS Managed Municipal – Intermediate \(Tax-Managed\)](#)

[Parametric TABS Managed Municipal – Long \(Tax-Managed\)](#)

[Parametric TABS Municipal Ladders](#)

[Parametric TABS Total Return Limited Maturity](#)

[Parametric TABS Total Return Intermediate Maturity](#)

[Parametric TABS Total Return Long Maturity](#)

[Parametric U.S. Corporate Ladders](#)

Multi-Asset



Designed specifically for high-net-worth investors, our multi-asset portfolios offer a variety of solutions to pursue investment goals and maximize after-tax wealth.

[Calvert Responsible Allocation Strategies](#)

[Parametric Custom Multi-Asset](#)

ESG



Choose from a wide range of actively managed and passive ESG strategies to help build a diverse portfolio.

[Atlanta Capital High Quality Calvert Equity](#)

[Calvert International Equity \(ADR\)](#)

[Calvert International Responsible Index](#)

[Calvert Managed Municipal](#)

[Calvert Mid Cap](#)

[Calvert Municipal Ladders](#)

[Calvert Responsible Allocation Strategie](#)

[Calvert Small/Mid Cap](#)

[Calvert U.S. Corporate Ladders](#)

[Calvert U.S. Large-Cap Core Responsible Index](#)

[Calvert U.S. Large-Cap Growth Responsible Index](#)

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[Calvert's ESG Research Global Developed Markets Equity Leaders](#)

[Calvert's ESG Research Global ex-U.S. Developed Markets Equity Leaders](#)

[Calvert's ESG Research U.S. Large-Cap Equity Leaders](#)

[Parametric Custom Core®](#)

[Parametric Custom Multi-Asset](#)

[Parametric U.S. Corporate Ladders](#)

Alternatives



Our alternative strategies offer powerful potential to enhance diversification, lower portfolio volatility and improve risk-adjusted performance.

Parametric Option Programs

Parametric DeltaShift®

Parametric Dynamic Hedged Equity

Parametric Dynamic Put Selling (DPS)

Parametric Option Absolute Return Strategy (OARS)

Parametric Portfolio DeltaShift®

Parametric Risk-Managed Put Selling (RPS)

Parametric Tax Managed Portfolio DeltaShift

[Visit our Customized Investing Center for flexible solutions from a leader in SMA investing.](#)



Videos



Blogs

Visit the Eaton Vance and Parametric blogs for timely insights on the issues that matter most to advisors and their clients.

[EATON VANCE ADVISORY BLOG](#)

[PARAMETRIC BLOG](#)

*Source: Money Management Institute & Cerulli Associates: Advisory Solutions Quarterly. Based on AUM among Separate Account Consultant Program Asset Management Groups, as of Q2 2021.

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Two International Place
Boston, MA 02110

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Taxes & Tools

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