

Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to investors.

Featured



[RESPONSIBLE INVESTING](#)

[Engagement update: 99% of Top 100 companies agree to disclose diversity data](#)

By: [John Wilson](#) | November 23, 2022

Investors often lack the information that we need to evaluate corporate diversity performance as a material issue for our investment decisions. This issue brief details Calvert's engagement effort to ask companies to make their EEO-1 reports public, and to release their pay equity data.

[READ FULL PAPER](#)

LATEST

[RESPONSIBLE INVESTING](#)

[Global Gender Gap Slowly Narrowing, Pay Parity Remains Key](#)

By: [Yijia Chen, CFA](#) | August 26, 2022

Washington - As August 26 marks "Women's Equality Day," and the 102nd anniversary of U.S. women's right to vote, it seems a fitting time to look at progress being made toward gender equity worldwide. In its 16th Global Gender Gap Report, the World Economic Forum (WEF) said overall gender disparity across politics, work, health and education has improved globally — with distinct regional differences — but it will take 132 years to close the gender gap.¹ Key to closing the gender gap is women's economic progress, including wealth accumulation, pay parity and advancement to leadership roles in corporations, politics and elsewhere.

[READ MORE](#)

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.

FILTER ALL INSIGHTS

TOPIC CATEGORY

- All
- Volatility
- Leveraged Credit
- Equities
- Floating-Rate Loans
- Global Investing
- Emerging Markets Debt
- Investment Grade Fixed Income
- Small Cap
- Responsible Investing
- Markets and Economy
- Multi-Asset Credit

CONTENT TYPE

- All
- White Papers
- Viewpoint

BRAND

- All
- Calvert
- Eaton Vance

LANGUAGE

- All
- English

[Authors](#)



Filter Insights by Date

START DATE

Jun 02, 2022

END DATE

Dec 02, 2022

[OR SHOW RECENT RESULTS](#)

FILTER INSIGHTS

All Articles (5)

EQUITIES

[Overcoming Behavioral Biases: The Importance of Our Proprietary Portfolio Exercises](#)

By: Edward J. Perkin, CFA | November 9, 2022

Boston - All humans have behavioral biases, those blind spots that can impact decision-making. Some people are overconfident about their

abilities; others attribute too much value to things in their possession; some feel the pain of loss much more so than an equivalent amount of gain.

[READ MORE](#) 



Edward J. Perkin, CFA
Chief Investment Officer
Eaton Vance Equity

EQUITIES

[Looking Under the Hood: Not All Equity Returns Are Equal](#)

By: Aaron Dunn, CFA | & Bradley Galko, CFA | October 19, 2022

Boston - Investing in portfolios that track benchmark indexes can be a great investment approach when the market is going up. However, in certain market periods when interest rates are rising, inflation is surging and geopolitical tensions are high — 2022 is a good example — having an active manager who can identify leading companies priced at a discount to their intrinsic value may become essential.

[READ MORE](#) 



Aaron Dunn, CFA
Co-Head of Value Equity
Portfolio Manager
Eaton Vance Equity



Bradley Galko, CFA
Co-Head of Value Equity
Portfolio Manager
Eaton Vance Equity

EQUITIES

[Our Time Traveling Reporter Sees International Opportunities amid Regime Change](#)

By: Christopher M. Dyer, CFA | & Ian Kirwan | October 11, 2022

London - Active investing requires a forward-looking approach to selecting stocks and positioning portfolios for the market conditions we anticipate will emerge in the coming quarters and years. This is an especially challenging mandate in times of elevated volatility and uncertainty, as investors focus too much attention on current news and fears, and not enough on how the world will look and feel in the future. Our investment team's consistent focus on the sustainability of business models aims to provide resilience in periods of disruption and opportunity in the aftermath.

[READ MORE](#) 



Christopher M. Dyer, CFA
Head of Global Equity
Portfolio Manager
Eaton Vance Equity



Ian Kirwan
Portfolio Manager
Global
Eaton Vance Equity

[How Useful Are Consensus Estimates in Small Cap?](#)

By: *J. Griffith Noble, CFA* | & *Michael D. McLean, CFA* | August 10, 2022

Boston - In September 2018, we shared what we believed to be interesting research around the magnitude of annual forecasting error by Wall Street analysts. We found that these consensus earnings estimates for constituents of the Russell 2000 small-cap equity index were off by 47% on average over the eight-year study from 2010 to 2017. After four years and a big economic downturn, we revisit the analysis here.

[READ MORE](#) 



J. Griffith Noble, CFA
Co-Director of U.S.
Small/Mid-Cap Equity
Eaton Vance Equity



Michael D. McLean, CFA
Co-Director of U.S.
Small/Mid-Cap Equity
Eaton Vance Equity

EQUITIES

[Earning Excess Returns from Active Value Investing May Just Be Starting](#)

By: *Aaron Dunn, CFA* | & *Bradley Galko, CFA* | August 9, 2022

Boston - The most common question posed by our Value clients lately has been whether the cycle of value outperformance over growth is ending. Despite recent market noise, we don't think that is the case, but to answer this question effectively, it's essential to review how the definition of value investing has evolved over time.

[READ MORE](#) 



Aaron Dunn, CFA
Co-Head of Value Equity
Portfolio Manager
Eaton Vance Equity



Bradley Galko, CFA
Co-Head of Value Equity
Portfolio Manager
Eaton Vance Equity



INTERNATIONAL HEADQUARTERS

125 Old Broad Street
London, EC2N 1AR
United Kingdom

Accessibility	Privacy Policy	Legal Information	Terms of Use	Cookies Policy	Key Investor Information Documents
Principles for Responsible Investment	Benchmark Descriptions	Japanese Firewall Disclosure			

Marketing Communication

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.

This site (<https://global.eatonvance.com>) is operated by Eaton Vance Management (International) Limited ("We"). We are a limited company, registered in England and Wales under company number 4228294 and have our registered office at 125 Old Broad Street, London, EC2N 1AR. Our VAT number is 762717416. Eaton Vance Management (International) Limited is authorised and regulated by the Financial Conduct Authority ("FCA") and is entered on the FCA's register with register number 208634.

Eaton Vance Management (Registration No. 1121368) and Parametric Portfolio Associates LLC (Registration No. 1217626) are the registered trade marks of The Eaton Vance Group.

Information on this website 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. It is your responsibility to be aware of and to observe all applicable laws and regulations of any relevant jurisdiction. The information on this webpage is not intended for U.S. residents. To visit our U.S. website please click [here](#). Information on this website 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. It is your responsibility to be aware of and to observe all applicable laws and regulations of any relevant jurisdiction. The information on this webpage is not intended for U.S. residents. To visit our U.S. website please click [here](#).

The views expressed 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.

In the EU this website is operated by MSIM Fund Management (Ireland) Limited (MSIM FMIL). The business of Eaton Vance Global Advisors Limited was transferred to MSIM FMIL on 1 October 2021. MSIM FMIL has been appointed as management company of the Eaton Vance International (Ireland) Funds plc and is responsible for the distribution of the funds together with the distribution of Eaton Vance strategies and strategies of Eaton Vance affiliates. For any queries in respect of the products and strategies referred to on this website, please contact MSIM FMIL at 7-11 Sir John Rogerson's Quay, Dublin 2, D02 VC42, Ireland. MSIM FMIL is regulated by the Central Bank of Ireland with Company Number: 616661.

Outside of the US and EU, this material is issued by Eaton Vance Management (International) Limited ("EVMIL") 125 Old Broad Street, London, EC2N 1AR, UK, and is which is authorised and regulated in the United Kingdom by the Financial Conduct Authority.

This material is only intended for and will only be distributed to persons resident in jurisdictions where such distribution or availability would not be contrary to local laws or regulations.

This material does not constitute an offer to sell or the solicitation of an offer to buy any services referred to expressly or impliedly in the material in the People's Republic of China (excluding Hong Kong, Macau and Taiwan, the "PRC") to any person to whom it is unlawful to make the offer or solicitation in the PRC.

The material may not be provided, sold, distributed or delivered, or provided or sold or distributed or delivered to any person for forwarding or resale or redelivery, in any such case directly or indirectly, in the People's Republic of China (the PRC, excluding Hong Kong, Macau and Taiwan) in contravention of any applicable laws.

In Singapore, Eaton Vance Management International (Asia) Pte. Ltd. ("EVMIA") holds a Capital Markets Licence under the Securities and Futures Act of Singapore ("SFA") to conduct, among others, fund management, is an exempt Financial Adviser pursuant to the Financial Adviser Act Section 23 (1) (d) and is regulated by the Monetary Authority of Singapore ("MAS"). Eaton Vance Management, Eaton Vance Management (International) Limited and Parametric Portfolio Associates@LLC holds an exemption under Paragraph 9, 3rd Schedule to the SFA in Singapore to conduct fund management activities under an arrangement with EVMIA and subject to certain conditions.

EVMIL is registered as a Discretionary Investment Manager in South Korea pursuant to Article 18 of Financial Investment Services and Capital Markets Act of South Korea.

Morgan Stanley Investment Management (Australia) Pty Limited ACN 122 040 037, AFSL No. 314182 arranges for Eaton Vance Management International Limited to provide financial services to Australian wholesale clients. This publication is disseminated in Australia by Morgan Stanley Investment Management (Australia) Pty Limited ACN: 122040037, AFSL No. 314182, which accepts responsibility for its content. This publication, and any access to it, is intended only for "wholesale clients" within the meaning of the Australian Corporations Act.

We are actively incorporating accessibility practices, such as those outlined in the Web Content Accessibility Guidelines, into our go-forward website design and content development to make information more accessible and user-friendly. In addition, we are developing a multi-year accessibility strategy and content guidelines that further support the use of assistive and adaptive tools. Our ultimate goal is to meet federal guidelines and policies or provide equivalent accommodations and service support for all customers.

Publication details: Thursday, June 23, 2022 11:18 AM

Page ID: 22977 - <https://global.eatonvance.com/viewpoints.php>

