Focused Growth Opportunities Strategy

Investment Overview

The strategy seeks growth across market sectors by investing in emerging, established, and evolving growth companies in the U.S.

- Bottom-up stock selection is the primary driver of excess returns, with every position evaluated in the context of reward vs. risk
- Employ differentiated research to identify growth outliers - stable companies with the ability to adapt and evolve
- We look for companies with: large addressable markets, unique products or services, high profitability, and strong management teams
- Typical average annual turnover range: 40% to 80%

Portfolio Construction

- Typically hold 25-40 positions
- Sector weights +/- 500 basis points vs. the Russell 1000® Growth Index
- Cash is typically held to less than 5% of the portfolio

Investment Team

	Yana S. Barton, CFA Managing Director, Director of Specialty Solutions	Joined investment management industry in 1997 Joined Eaton Vance in 1997	BS, University of Florida

Benchmark

- Russell 1000® Growth Index



Investment Capabilities **Contact**

Fixed-Income
Equity
Alternative

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