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# Large-Cap Growth Strategy

## Investment Overview

The strategy seeks diversified 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 60-80 positions
- Sector weights +/- 500 basis points vs. the Russell 1000® Growth Index
- Maximum position size equal to greater of 5% or plus 2% above the largest benchmark weight
- Cash is typically held to less than 5% of the portfolio

## Investment Team



Douglas Rogers, CFA, CMT  
Managing Director, Portfolio Manager

Joined investment management  
industry in 1999

Joined Eaton Vance in 2001

B.S. United States Naval  
Academy

M.B.A. Harvard University

## Benchmark

Benchmark: Russell 1000® Growth Index



## HEADQUARTERS

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