



Managed Accounts

The Eaton Vance family of companies delivers customized, highly specialized SMA strategies to address the unique investment challenges of high-net-worth investors. Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

We are one of the
largest SMA
managers in the
U.S.*

Featured strategies

	STRATEGY INFORMATION	RESOURCES
Parametric Custom Core® Market-like equity returns, active tax management and customization		Advisor Tools
Parametric TABS Municipal Ladders Focused on maximizing after-tax income and managing interest rate risk	TABS Municipal Ladders Fact Sheet	Parametric Website Municipal Bond Market Insight
Parametric Corporate Ladders Focused on generating income and managing interest rate risk	Corporate Ladders Fact Sheet	Parametric Website Corporate Bond Market Insight
Parametric TABS Managed Municipals Actively managed municipals seeking tax-exempt income and capital preservation	TABS Managed Municipals Short TABS Managed Municipals Intermediate TABS Managed Municipals Long	Parametric Website Municipal Bond Market Insight

All separately managed strategies

Equity

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Fixed Income

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*Source: Cerulli Associates: The Cerulli Edge - U.S. Managed Accounts Edition. Based on AUM of Parametric Portfolio Associates, Morgan Stanley Investment Management, Atlanta Capital Management Co. and Eaton Vance among Separate Account Consultant Program Asset Management Groups, as of Q2 2024.

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