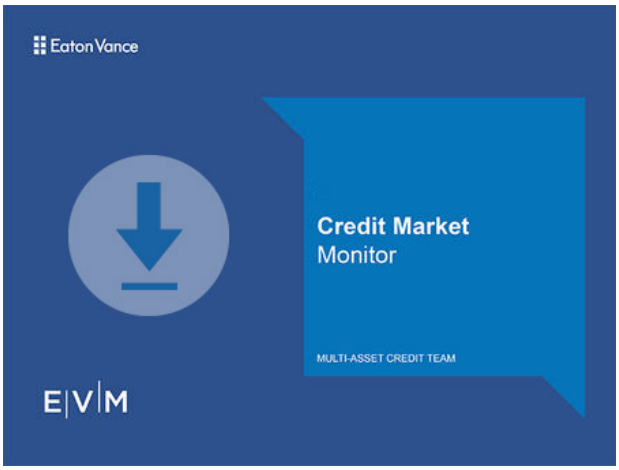
Leveraged Credit: A Market Leader Since 1982

After helping shape the growth of the high-yield bond and floating-rate loan sectors for almost 40 years, Eaton Vance has built a reputation as a premier manager of leveraged credit, with more than 50 experienced specialists.

$50+ Billion (US) in leveraged credit AUM*

Attractive risk-adjusted returns through the cycle

A strong culture of loss-avoidance



*Source: Eaton Vance Management, which is an investment adviser registered with the United States Securities and Exchange Commission and a wholly owned subsidiary of Eaton Vance, as of 31 December 2021. AUM figure is total leveraged credit assets managed by Eaton Vance Management and its brands (together, “Eaton Vance”).

- Our Edge
- Our Heritage
- Offerings & Team
- Approach & Resources

The Eaton Vance edge

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Expertise in Sub-Investment Grade Debt

Our floating-rate loan and high-yield bond portfolios are managed by experienced, long-tenured investment teams – qualities especially important for managing sub-investment grade debt.

OUR TEAM

Andrew Sveen, CFA

Director of Floating-Rate Loan Group, Portfolio Manager

Full bio

Craig Russ

Floating-Rate Loan Group, Portfolio Manager

Full bio

Jeffrey D. Mueller

Co-Director and Portfolio Manager, High Yield Group

Full bio

John P. Redding

Portfolio Manager, Floating Rate Loans Group

Full bio

Justin H. Bourgette, CFA

Director of Investment Strategy

Full bio

Ralph Hinckley, CFA

Portfolio Manager, Senior Research Analyst

Full bio

Stephen Concannon, CFA

Co-Director and Portfolio Manager, High Yield Group

Full bio

Kelley Baccei

Portfolio Manager

Full bio

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Our Team's Key Attributes

50 long-tenured professionals with extensive experience*

- Diverse backgrounds and skill sets
- 25 CFA Charterholders

A consistent philosophy & repeatable process

- Fundamentals & Valuations over Technicals & Momentum
- A strong culture of downside risk management

Globally integrated resources & perspectives

- Ability to leverage expertise of 190+ colleagues around the world
- Integration of sophisticated, proprietary ESG analysis

* Eaton Vance's leveraged credit investment professionals have, on average, 16 years of industry experience. Source: Eaton Vance as at 31 December 2020.

ESG Integration

Our portfolios benefit from proprietary ESG research from Eaton Vance subsidiary Calvert Research and Management ("Calvert"), a global specialist in Responsible Investing.

Our ESG Research
The focus on sustainable business practices has raised the potential for embedded environmental, social and governance (ESG) risk premia in markets. All other things being equal, we believe companies with strong or improving ESG practices can enjoy a low or falling cost of capital and vice-versa. And if we can identify the potential for company's success (or failure) in addressing specific ESG issues, we will be able to assess improving (or deteriorating) credits over the long term. So, as part of our traditional fundamental research, we also integrate ESG risk factor considerations into our credit analysis.

Walking the Talk

While many investment firms talk about "ESG integration", in reality, many struggle to truly leverage ESG insights, either because of a lack of experience understanding which specific ESG issues are most material to a given company or an over-reliance on limited data sets.

So how is Eaton Vance different?

A Group Wholly Dedicated to ESG: With access to a dedicated team of ESG researchers via subsidiary company Calvert – we're able to tap into the expertise of some of the most knowledgeable investment experts in the field.

Our proprietary Calvert Research System: This research model is designed specifically to deal with common ESG analytics challenges, such as inconsistent company reporting, absent information, and difficulty determining which specific ESG factors are most material to each sector of the market.

Peer Group Models: Our time-tested, yet ever-evolving, models help quantify ESG risk and, ultimately, price risk across the market to allow for relevant comparisons between credits within specified peer groups. If we cannot quantify and price risk appropriately for a particular company, we will not invest in it.

Primary tools for ESG-inclusive credit analysis:

An ESG Sector Thesis Breakdown: A detailed explanation of the financially material ESG factors for each specific sector. It is a helpful first step for Eaton Vance credit analysts seeking to understand the most relevant prevailing ESG risks in each segment of their investment universe.

A 3,000 Company Research Database: Housing Calvert's proprietary research on roughly 60% of companies in the global high-yield bond universe. This database allows Eaton Vance analysts to see the ESG ratings assigned to a particular company as well as how it compares to its

peer group.

Bespoke research: If a company is not covered in the Calvert database, one of our Leveraged Credit analysts will work directly with a Calvert analyst to conduct ESG-focused research on that particular company.

Custom Solutions

We also cater to institutions' specific needs, managing a range of complex, custom portfolios for large clients.

Our heritage in Leveraged Credit

1982

US high yield strategy launched

1989

Floating-rate loan strategy launched

1991

First investment in securitised credit

1996

First investment in emerging markets bonds

1999

First CDO investment

2000

CLO offering launched

2003

First MAC closed-end vehicle, investing across bank loans, high yield and structured credit

2007

US high yield strategy surpasses 25-year track record

2013

First MAC institutional separately managed account

2014

Floating-rate loan strategy surpasses 25-year track record

2015

European and Global high yield strategies launched

2016

“Intelligent integration” MAC strategy launched

2019

Global high yield strategy reaches USD $1bn AuM

Our Offerings

1/3

High Yield Floating-Rate Loans Multi-Asset Credit

High Yield

Our line-up of high-yield offerings employ rigorous fundamental credit research and market-factor analysis to capitalize on inefficiencies in the high-yield bond market. Via an opportunistic, value-driven approach, we seek to deliver consistent risk-adjusted performance with high information ratios and a favorably skewed up/down market capture.

- US High Yield
  - Strategy Profile
  - Fund Fact Sheet
  - Investment Team
- Global High Yield
  - Strategy Profile
  - Fund Fact Sheet
  - Investment Team
- European High Yield
  - Investment Team
- Short Duration High Income
  - Investment Team

- US
  - SDHI Strategy
  - SDHI Fact sheet
  - SDHI TEAM

Past performance is no guarantee of future results. The information is based upon the total assets of all fee-paying discretionary accounts in the Composite for the periods shown. Gross returns for the Composite are calculated in U.S. dollars, include the reinvestment of distributions, and are after transaction costs, any foreign withholding taxes and other direct expenses, but before management fees, custody charges and other indirect expenses. Such fees and expenses would reduce the results shown. Click here for Composite's GIPS® presentation

- US
  - Strategy Profile
  - Fund Fact Sheet
  - Investment Team
- Global High Yield
  - Strategy Profile
  - Fund Fact Sheet
  - Investment Team
- EU High Yield
  - Investment Team
- Short Duration High Income
  - Investment Team

Floating-Rate Loans

This strategy provides "intelligent exposure" to the floating-rate loan market, thoughtfully diversifying while assuming a higher-quality bias that seeks lower volatility and better risk-adjusted performance over time. **Watch our latest flash update on Floating-Rate Loans.**

- Floating-Rate Loan
  - Strategy Profile
  - Fund Fact Sheet
  - Investment Team
- Floating-Rate Loan
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  - Fund Fact Sheet
  - Investment Team

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- Floating-Rate Loan
  - Strategy Profile
  - Fund Fact Sheet
  - Investment Team

Multi-Asset Credit

Aimed at investors who want seasoned professionals to take charge of asset allocation and security selection across the higher yielding credit and risk spectrum, our offering is typically used as a complement to a client's "core" fixed income exposures. The Multi-Asset Credit strategy is designed to capture credit risk premiums across different income sectors and corporate capital structures, with a strong focus on downside protection and the avoidance of permanent capital impairment. Our MAC portfolio benefits from Eaton Vance's world-class capability in high yield, floating-rate loans, securitized credit and emerging-markets debt.

- Multi-Asset Credit
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- Floating-Rate Loan
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More Information

Our Approach ESG Factor Integration Resources

Our Approach

Discipline Beats Short-Term Thinking

At Eaton Vance, we evaluate a wide range of issuers and select only those we believe offer the greatest risk-adjusted return potential. The decision to not invest can often take more discipline than going along with the crowd. Our experience and track record demonstrate our ability to

generate consistent excess returns in a risk-controlled way.

Fundamentals & Valuations Over Technicals & Momentum

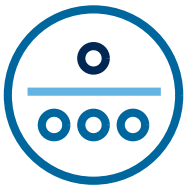
We believe the key driver of long-term returns is starting valuations. As long-term investors, our focus is on valuations, fundamentals and risk factor analysis rather than technicals and momentum.

A Strong Culture of Managing Downside Risk

We believe true risk is the permanent impairment of capital. Accordingly, we prioritize our focus on avoiding defaults and limiting downside risk, which in turn, we believe, allows us to deliver attractive information ratios and Sharpe ratios over time.

Global Perspective & Resources

With an integrated resource model, we seek to leverage the time, tools and resources of multiple Eaton Vance investment teams around the world, helping our global portfolios avoid regional biases.



ESG Risk Factors

We believe environmental, social and governance (ESG) factors can impact asset prices and thus incorporate ESG risk factor analysis into our investment process.

ESG Factor Integration
The focus on sustainable business practices has raised the potential for embedded environmental, social and governance (ESG) risk premia in markets. All other things being equal, we believe companies with strong or improving ESG practices can enjoy a low or falling cost of capital and vice-versa. And if we can identify the potential for company's success (or failure) in addressing specific ESG issues, we will be able to assess improving (or deteriorating) credits over the long term. So, as part of our traditional fundamental research, we also integrate ESG risk factor considerations into our credit analysis.

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Bespoke research: If a company is not covered in the Calvert database, one of our Leveraged Credit analysts will work directly with a Calvert analyst to conduct ESG-focused research on that particular company.

Resources

Monthly Market Monitor

Explore

Credit Market Monitor

Browse

Insights

Read Articles

Where possible the Strategies/Funds seeks to take into account ESG factors into their research and decision making, however, the Strategies/Funds noted herein are classified as an Article 6 Strategy/Fund of the EU Council Disclosure Regulation (2019/2088).

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US High Yield Team

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Floating-Rate Loans Team

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Floating-Rate Loan Group, Portfolio Manager

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Portfolio Manager, Floating Rate Loans Group

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Director of Income Product & Portfolio Strategy, Institutional Portfolio Manager

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Multi-Asset Credit Team

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Craig Russ

Floating-Rate Loan Group, Portfolio Manager

Craig Russ is a vice president of Eaton Vance Management and portfolio manager on Eaton Vance's floating-rate loan team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's floating-rate loan strategies. He joined Eaton Vance in 1997.

Craig began his career in the investment management industry in 1985. Before joining Eaton Vance, he worked in commercial lending at State Street Bank.

Craig earned a B.A., cum laude, from Middlebury College and studied at the London School of Economics.
He previously served as chairman of the board of directors of the Loan Syndications and Trading Association (LSTA). His commentary has appeared in Bloomberg, Grant's Interest Rate Observer and The Wall Street Journal.

Andrew Sveen, CFA

Director of Floating-Rate Loan Group, Portfolio Manager

Andrew Sveen is a vice president of Eaton Vance Management, Director of bank loans and portfolio manager on Eaton Vance's floating-rate loan team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's floating-rate loan strategies. He joined Eaton Vance in 1999. Andrew began his career in the investment management industry in 1995. Previously at Eaton Vance, he was director of loan trading and capital markets. Before joining Eaton Vance, he worked as a corporate lending officer at State Street Bank. Andrew earned a B.A. from Dartmouth College and an MBA from the William E. Simon School at the University of Rochester. He is a CFA charterholder. Andrew serves as a member of the board of directors of the Loan Syndications and Trading Association (LSTA). His commentary has appeared in Bloomberg, Financial Times and Reuters.

Jeffrey D. Mueller

Co-Director and Portfolio Manager, High Yield Group

Jeffrey Mueller is a vice president of Eaton Vance Advisers International Ltd., co-director of high yield and portfolio manager on Eaton Vance's high-yield team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's high-yield and multi-asset credit strategies. He is also a member of the firmwide asset allocation committee. He joined Eaton Vance in 2015.

Jeff began his career in the investment management industry in 2004. Before joining Eaton Vance, he was a high-yield portfolio manager with Threadneedle Investments. He was previously affiliated with Centaurus Capital Ltd. and Amaranth Advisors LLC.

Jeff earned a B.B.A. from the University of Wisconsin at Madison.

John P. Redding

Portfolio Manager, Floating Rate Loans Group

John Redding is a vice president of Eaton Vance Management and portfolio manager Eaton Vance's floatingrate loan team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's floating-rate loan strategies. He joined Eaton Vance in 1998. John began his career in the investment management industry in 1987. Before joining Eaton Vance, he was affiliated with GiroCredit Bank and Creditanstalt-Bankverein. John earned a B.S. from the University at Albany, State University of New York. While in London, he served on the board of directors of the Loan Market Association (LMA) and chaired the LMA's Insolvency Priority Group. His commentary has appeared in the Financial Times and Bloomberg.

Justin H. Bourgette, CFA

Director of Investment Strategy

Justin Bourgette is a vice president of Eaton Vance Management and director of investment strategy on Eaton Vance's high-yield team. He is a portfolio manager responsible for idea generation, portfolio construction and risk management across a suite of multisector and asset allocation strategies. Justin joined Eaton Vance in 2006.

Justin began his career in the investment management industry in 2006. Before joining Eaton Vance, he was affiliated with Investors Financial Services and National Grid.

Justin earned a B.S. from Worcester Polytechnic Institute and an M.S., with high honors, from Boston University. He is a CFA charterholder and a member of Eaton Vance's Asset Allocation Working Group.

Scott Page, CFA

Senior Portfolio Advisor, Portfolio Manager, Floating-Rate Loans Group

Scott Page is a vice president of Eaton Vance Management and senior advisor on Eaton Vance's floatingrate loan team. He is engaged in initiatives focused on continuing to advance Eaton Vance's presence as a leading floating-rate loan investment manager for institutions and individuals globally. He joined Eaton Vance in 1989. Scott began his career in the investment management industry in 1981. Before joining Eaton Vance, he was affiliated with the Dartmouth College Investment Office, as well as Citicorp and Chase Manhattan Bank in corporate finance/lending and credit review. Scott earned a B.A. from Williams College and an MBA from the Amos Tuck School at Dartmouth College. He has served as a member of the board of directors of the LSTA (Loan Syndications and Trading Association). He is a CFA charterholder. Scott co-authored "An Overview of the Loan Market" in the Handbook of Loan Syndications and Trading (2007). He is a trustee, chair of the investment committee and member of the executive committee of the New England Aquarium. Additionally, he is a board member of AFGlobal as well as Calvert Impact Capital.

Michael Kinahan, CFA

Head of Structured Products, Portfolio Manager

Michael Kinahan is a vice president of Eaton Vance Management and portfolio manager on Eaton Vance's floating-rate loan team. He is responsible for the firm's CLO management business, CLO investment activities and several institutional separate accounts. He is also occasionally involved in bank loan restructuring. He joined Eaton Vance in 1998. He was manager of financial planning & analysis until 2000 when he joined the bank loan team to develop the CLO business. Mike began his career in the investment management industry in 1994. Before joining Eaton Vance, he was affiliated with Australian Portfolio Managers in Sydney, Australia and at Deloitte & Touche as a manager in the audit department. Mike earned a B.S. from the University of Southern California. He is a CFA charterholder and a member of the CFA Society Boston, CFA Institute and the American Society of CPAs.

Ralph Hinckley, CFA

Portfolio Manager, Senior Research Analyst

Ralph Hinckley is a vice president of Eaton Vance Management and portfolio manager and analyst on Eaton Vance's floating-rate loan team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's floating-rate loan strategies. He joined Eaton Vance in 2003. Ralph began his career in the investment management industry in 1997. Before joining Eaton Vance, he was a vice president in the communications lending division of Citizens Bank and its credit training program and a lending officer at State Street Bank. Ralph earned a B.A. from Bates College and an MBA, with honors, from Boston University Graduate School of Management. He is a member of the CFA Society Boston and is a CFA charterholder.

Stephen Concannon, CFA

Co-Director and Portfolio Manager, High Yield Group

Stephen Concannon is a vice president of Eaton Vance Management and portfolio manager on Eaton Vance's high-yield team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's high-yield strategies. He joined Eaton Vance in 2000. Steve began his career in the investment management industry in 1993. Before joining Eaton Vance, he was a research analyst for Wellington Management. Steve earned a B.A. from Bates College. He is a member of the CFA Society Boston and is a CFA charterholder.

Kelley Baccei

Portfolio Manager

Kelley Baccei is a vice president of Eaton Vance Management and a portfolio manager on Eaton Vance's high-yield team. She is responsible for buy and sell decisions and portfolio construction. She joined Eaton Vance in 2005. Kelley began her career in the investment management industry in 2000. Before joining Eaton Vance, she was the director of high-yield distressed research at Fieldstone Capital Group. Previously, she was associate director of fixed-income research at Scotia Capital Markets, Inc. Kelley earned a B.A. from Boston College and a certificate in credit analysis from New York University.

Donal Kinsella, FIA, CAIA

Institutional Portfolio Manager

Donal Kinsella is a vice president of Eaton Vance Management (International) Limited and an institutional portfolio manager for Eaton Vance's broad suite of credit strategies, focusing on high-yield bonds and multi-asset credit. In addition to contributing to the investment management and

portfolio construction process, he also serves as a resource for existing and prospective clients around the world, representing the firm's managed strategies and presenting views and insights on global credit mandates. He joined Eaton Vance in 2018.

Donal began his career in the investment management industry in 2010. Before joining Eaton Vance, he was a client portfolio manager at Janus Henderson Investors. Previously, he worked for Lane Clark & Peacock and Mercer Investments.

Donal earned a B.S. from University College of Dublin. He holds the chartered alternative investment analyst (CAIA) designation and is a fellow of the Institute and Faculty of Actuaries.

William Reardon

Institutional Portfolio Manager

William Reardon is a vice president of Eaton Vance Management and an institutional portfolio manager for Eaton Vance's suite of high-yield debt strategies. He is responsible for client and internal communications and insights on investment strategy and portfolio positioning. He joined Eaton Vance in 2013.

Will began his career in the investment management industry in 2012. Before joining Eaton Vance, he was affiliated with Allied Minds. He previously served in the military for 11 years as a Navy SEAL officer.

Will earned a B.A. from Miami University (Ohio) and an MBA from MIT Sloan School of Management.

Christopher Remington

Director of Income Product & Portfolio Strategy, Institutional Portfolio Manager

Christopher Remington is a vice president of Eaton Vance Management, director of product and portfolio strategy for income and credit mandates and an institutional portfolio manager for Eaton Vance floatingrate loan strategies. Chris is responsible for market research and analysis, advancing the firm's managed strategies through thoughtful investment communications and insights on the credit markets. He joined Eaton Vance in 2008.

Chris began his career in the investment management industry in 2000. Before joining Eaton Vance, he was affiliated with Fidelity Investments as a fixed-income product specialist. He was responsible for product strategy, investment communications and client portfolio management for Fidelity's suite of fixed-income investment capabilities. Prior to Fidelity, Chris was affiliated with Spelman & Company, where he was responsible for investment analytics and portfolio management.

Chris earned a B.S. in economics and an MBA in finance. He is a graduate of Clark University. His commentary has appeared in Financial Times, The Wall Street Journal, Bloomberg News, Money Management, Dow Jones Newswire, FundFire and SmartMoney, among other leading financial

media outlets.

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The value of your investment can go up or down so you may get back less than your initial investment. Past performance is not a guide to future returns.

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Publication details: Tuesday, May 23, 2023 10:45 AM
Page ID: 37646 - https://www.eatonvance.at/leveraged-credit.php