

Parametric Municipal Bond Strategies

Investment Overview

- Managed for after-tax total return
- Customizable Investment Solutions — Credit and Duration
- Smart Beta + Active Management
- Core Municipal Market Exposure
- Alpha Added from TABS Security Selection
- TABS Crossover Trade
- Portfolios structured to seek high risk-adjusted income

Portfolio Construction

- Quantitative approach to structuring portfolios across the yield curve
- Portfolio is optimised for an after-tax total return or risk-adjusted income
- Credit quality customisable within the investment grade spectrum (e.g. AA and higher; A and higher; BBB and higher)
- Customisable duration targets
- Issuer concentration typically limited to 5 % of assets

Investment Team

	Jim Evans, CFA, Director of Tax-Advantaged Bond Strategies (TABS)	35 years of industry experience 10 years at Eaton Vance	BS, Cornell University
	Brian Barney, CFA, Director of Institutional Portfolio Strategies	17 years of industry experience 10 years with Eaton Vance	B.S., University of Virginia
	Devin Cooch, CFA, Vice President and Portfolio Manager	11 years of industry experience 10 years with Eaton Vance	B.A., Bucknell University
	Alison Wagner, CFA, Portfolio Manager and Trader	9 years of industry experience 6 years with Eaton Vance	BS, Boston College

Benchmark

- Customisable benchmarks
- Current mandates include Bloomberg Barclays Managed Money Municipal Bond Index: Customized Short (1-7 Years), Short/Intermediate (1-10 Years), Intermediate (1-17 Years), Customized Long Broad (7-20 Years), Long (10+ Years)



**INTERNATIONAL
HEADQUARTERS**
125 Old Broad Street
London, EC2N 1AR
United Kingdom

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