



# Advanced Investing

Forward-thinking investors have more advanced needs. We provide a diverse selection of strategies and personalized wealth management solutions to meet them.

Time-tested investment principles

Deep and rewarding client experiences

Evolving strategies for changing needs



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What’s inside your ETFs? Look inside ours, and you’ll find specialized teams managing distinct strategies built for long-term results.

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## Featured Strategies

### National Municipal Income Fund (I)

EIHM

A diversified, credit-focused approach to municipal bond investing.

**\$9.22** ▲ **\$0.03**

NAV as of May 3, 2024

### Short Duration Government Income Fund (I)

EILD

Diversified exposure to high-quality U.S. government securities—with limited interest-rate risk.

**\$7.18** ▲ **\$0.02**

NAV as of May 3, 2024

### Calvert International Equity Fund (I)

CWV

The Fund seeks to provide a high total return consistent with reasonable risk by investing primarily in a diversified portfolio of stocks.

**\$24.36** ▲ **\$0.18**

NAV as of May 3, 2024

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Want to keep your clients well-informed and focused on what they can control this election cycle? Follow a leader in tax-managed investing.

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## Morgan Stanley Investment Management Featured Strategies

### Ultra-Short Income Portfolio (IN)

MUIIX

Seeks current income with capital preservation while maintaining liquidity.

### Global Franchise Portfolio (I)

MSFAX

Invests bottom-up in a concentrated portfolio of high-quality, well-managed companies at a reasonable price.

### US Core Portfolio (I)

MUOIX

Combines quantitative and fundamental research to identify 30-60 companies with strong investment potential.

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HIGH-CONVICTION  
EQUITIES

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AND LIQUIDITY

ALTERNATIVE  
INVESTMENTS

CUSTOMIZED  
SOLUTIONS

SUSTAINABLE  
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TAX  
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