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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



The BEAT

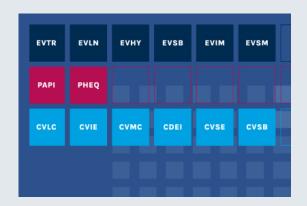
Use The BEAT as your timely resource for this month's markets. Each edition gives you ideas and insights that show you how to navigate the current investment environment.

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The Symbols of Broad-Based Specialization

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





Featured Strategies

National Municipal Income Fund (I)

EIHMX

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

\$9.26 \$-0.02

NAV as of May 20, 2024

Short Duration Government Income Fund (I)

EILDX

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

\$7.19 \$-0.01

NAV as of May 20, 2024

Calvert International Equity Fund (I)

CWVIX

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

\$25.30 \$-0.01

NAV as of May 20, 2024

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Navigating 2024: Politics, Policies and Portfolios

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

<u>Ultra-Short Income</u> <u>Portfolio (IN)</u>

MUIIX

Seeks current income with capital preservation while maintaining liquidity.

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Global Franchise Portfolio (I)

MSFAX

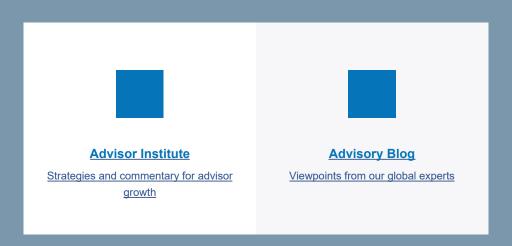
Invests bottom-up in a concentrated portfolio of high-quality, well-managed companies at a reasonable price.

US Core Portfolio (I)

MUOIX

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

Get timely, in-depth insights from our experts to help guide investment discussions.



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INVESTMENT CAPABILITIES

We offer a broad range of strategies, deep experience in sustainable investing and industry-leading customization and tax management solutions.

Bro



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One Post Office Square
Boston, MA 02110

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