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# 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



#### The BEAT

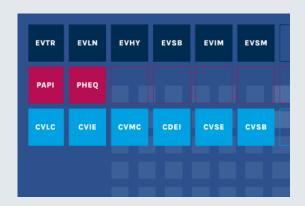
Use The BEAT as your timely resource for this month's markets. Each edition gives you ideas and insights that show you how to navigate the current investment environment.

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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.

\$9.29 ^ \$0.01

NAV as of May 15, 2024

## **Short Duration Government Income Fund (I)**

EILDX

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

\$7.22 \$0.03

NAV as of May 15, 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.

\$25.48 \$0.31

NAV as of May 15, 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** 

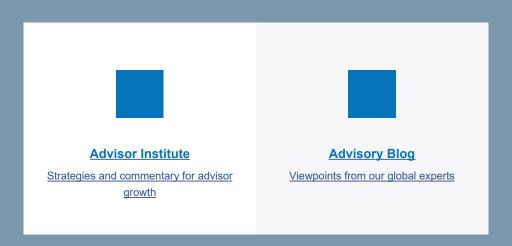
Invests bottom-up in a concentrated portfolio of high-quality, well-managed companies at a reasonable price.

### **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.

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One Post Office Square
Boston, MA 02110

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