

# 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.

|      |      |      |      |      |      |
|------|------|------|------|------|------|
| EVTR | EVLN | EVHY | EVSX | EVIM | EVSM |
| PAPI | PHEQ |      |      |      |      |
| CVLC | CVIE | CVMC | CDEI | CVSE | CVSB |



## Featured Strategies

### National Municipal Income Fund (I)

EIHMIX

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

\$9.19

▲ \$0.00

NAV as of Apr 18, 2024

### Short Duration Government Income Fund (I)

EILDIX

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

\$7.10

▼ \$-0.03

NAV as of Apr 18, 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.

\$23.38

▼ \$-0.09

NAV as of Apr 18, 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

### 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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### INVESTMENT CAPABILITIES

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

HIGH-CONVICTION  
EQUITIES

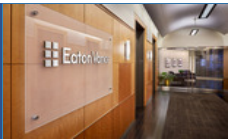
ACTIVE FIXED INCOME  
AND LIQUIDITY

ALTERNATIVE  
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CUSTOMIZED  
SOLUTIONS

SUSTAINABLE  
INVESTING

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| <a href="#">Eaton Vance Funds</a>                | <a href="#">Advisory Blog</a>         | <a href="#">Investment Tax Center</a>                          | <a href="#">Forms &amp; E-Delivery</a>                |
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|                                                  |                                       |                                                                | <a href="#">Press Releases</a>                        |
|                                                  |                                       |                                                                | <a href="#">Diversity and Inclusion</a>               |

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