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Advanced Investing

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Time-tested investment principles

Deep and rewarding client experiences

Evolving strategies for changing needs



The BEAT

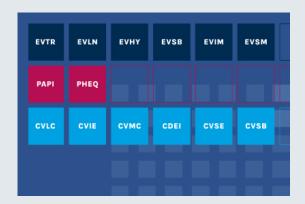
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What's inside your ETFs? Look inside ours, and you'll find specialized teams managing distinct strategies built for long-term results.





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National Municipal Income Fund (I)

EIHMX

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

NAV as of May 1, 2024

Short Duration Government Income Fund (I)

EILDX

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

\$7.14 \$0.03

NAV as of May 1, 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.

\$23.91 \$-0.04

NAV as of May 1, 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

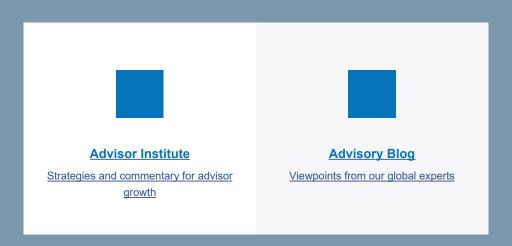
Invests bottom-up in a concentrated portfolio of high-quality, well-managed companies at a reasonable price.

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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