

[PRODUCT FINDER](#)[WEALTH STRATEGIES](#)[INVESTMENTS](#)[INSIGHTS](#)[TAXES AND TOOLS](#)

# Eaton Vance Parametric Laddered Investing Interest Rate Scenario Calculator

---

**TAX FORWARD ■ 365™**

---

Growing after-tax wealth  
takes tax-forward thinking

---

Changes in interest rates can create challenges and opportunities for fixed-income investors.

This calculator is designed to help you explore how laddered municipal and corporate bond portfolios may perform in different interest rate environments. For laddered municipal bond portfolios, the calculator also indicates the potential value of systematic tax-loss harvesting in a rising interest rate environment.

*The information presented is hypothetical and for illustrative purposes only, and does not reflect the actual or expected performance of any specific investment strategy.*

[Corporate Bonds](#)[Market Update](#)[Municipal Bonds](#)[Market Insight](#) [Laddered Bonds](#)[Explore Laddered Bond Strategies](#)



## Learn More About How Taxes Affect Your Investment Returns

What do I pay in taxes on my investments?

See the tax rates that apply to your investment returns.

[CALCULATE YOUR TOTAL TAX RATE](#) ➔

Manage concentrated stock positions

See how diversifying your portfolio on a tax-deferred basis can be a better option than a taxable sale of stock.

[CALCULATE THE IMPACT ON YOUR PORTFOLIO VALUE](#) ➔

Compare yields on different types of bonds

See how the yields of in-state municipal bonds compare with out-of-state municipals and taxable bonds on a tax-equivalent basis.

[CALCULATE YOUR AFTER-TAX YIELD POTENTIAL](#) ➔



### HEADQUARTERS

One Post Office Square  
Boston, MA 02110

### [Investments](#)

[Eaton Vance Funds](#)

[Parametric Funds](#)

[Calvert Funds](#)

[Separately Managed Accounts](#)

[Closed-End Funds and Term Trusts](#)

### [Insights](#)

[Advisory Blog](#)

[The BEAT](#)

[Market Update Events](#) 🔒

[The Advisor Institute](#)

### [Taxes & Tools](#)

[Investment Tax Center](#)

[Tax Information](#)

[Investment Tax Calculator](#)

[Laddered Investing Interest Rate Scenario Tool](#)

[Concentrated Stock Position Calculator](#)

[Tax-Equivalent Yield Calculator](#)

### [Resources](#)

[Forms & E-Delivery](#)

[Mutual Funds & Abandoned Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

[Accessibility](#) | [Business Continuity](#) | [Privacy & Cookies](#) | [Your Privacy Choices](#)  | [Terms & Conditions](#) | [Careers](#) | [Contact](#) | [Investor Account Access](#) | [Morgan Stanley Investment Management Terms of Use](#)

To report a website vulnerability, please go to [Responsible Disclosure](#).

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

For USA PATRIOT Act Disclosure Notice please click [here](#).

 This image indicates content designed specifically for Financial Advisors / Investment Professionals. This material is not to be used with the public.

Before investing in any Eaton Vance, Calvert or Morgan Stanley Investment Management Inc.-advised fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. Read the prospectus carefully before you invest or send money. For **open-end mutual funds**,

the current prospectus contains this and other information. To obtain an **open-end mutual fund** prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). For **closed-end funds**, you should contact your financial advisor. To obtain the most recent annual and semi-annual shareholder report for a closed-end fund contact your financial advisor or [download a copy here](#). To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or [download a copy here](#).

Before purchasing any **variable product**, consider the objectives, risks, charges, and expenses associated with the underlying investment option(s) and those of the product itself. For a prospectus containing this and other information, contact your investment or insurance professional. Read the prospectus carefully before investing.

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision. The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

© Eaton Vance Management. All rights reserved.

Eaton Vance open-end mutual funds are offered through Eaton Vance Distributors, Inc. One Post Office Square, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Tuesday, March 5, 2024 10:50 AM

Page ID: 40333 - <https://www.eatonvance.com/laddered-tools.php>