Eaton Vance

Our SMAs offer high-net-worth investors personalized strategies, flexibility and tax efficiency.

We are one of the largest SMA managers in the U.S.*

Since 1998, we’ve been providing customized investment strategies for SMA investors.

Featured SMA strategies
Parametric Custom Core
Market-like equity returns, active tax management and customization

Parametric TABS Municipal Ladders
Focused on maximizing after-tax income and managing interest rate risk

Parametric Custom Core Solutions

Municipal Bond Market Insight
Parametric Laddered Bond Strategies

Calvert U.S. Small Cap Strategy
Offers exposure to a diversified portfolio of quality U.S. companies judged to be adequately managing their material ESG risks and opportunities.

Eaton Vance Atlanta Capital High Quality Focused Growth
Seeks long-term growth by investing in high quality large-cap companies with a demonstrated history of consistent growth and stability in earnings

Visit our High-Net-Worth Investing Center for customized planning for the unique demands that affluence brings.

Tools
Explore all of our separately managed strategies

We offer a full range of separately managed strategies that you won’t find everywhere—including equity, fixed income, multi-asset, responsible investing and alternatives.

Equity

We offer active and index-based strategies for U.S., non-U.S. and global portfolios across a full range of market capitalizations and investment styles.

- Atlanta Capital High Quality Calvert Equity
- Atlanta Capital High Quality Focused Growth
- Atlanta Capital High Quality Growth Plus
- Atlanta Capital High Quality Select Equity
- Atlanta Capital High Quality Small Cap*
- Atlanta Capital High Quality SMID Cap*
- Calvert International Equity (ADR)
- Calvert International Responsible Index
- Calvert Mid Cap
- Calvert Small/Mid Cap
- Calvert U.S. Large-Cap Core Responsible Index
- Calvert U.S. Large-Cap Growth Responsible Index
- Calvert U.S. Large-Cap Value Responsible Index
- Calvert U.S. Mid-Cap Core Responsible Index
- Calvert U.S. Small Cap
- Calvert’s ESG Research Global Developed Markets Equity Leaders
- Calvert’s ESG Research Global ex-U.S. Developed Markets Equity Leaders
- Calvert’s ESG Research U.S. Large-Cap Equity Leaders
- Eaton Vance Focused Growth Opportunities
- Eaton Vance Focused Value Opportunities
- Eaton Vance Large-Cap Growth
- Eaton Vance Large-Cap Value
- Eaton Vance Mid-Cap Value
- Eaton Vance U.S. Small-Cap Equity
- Parametric Custom Core Fixed Income
- Parametric Custom Core®
- Parametric Dividend Income
- Parametric Enhanced Income Core
- Parametric Enhanced Income Tax-Advantaged Core
- Parametric International Equity

*This strategy is closed to new investors.
Fixed Income

Active management, in-depth fundamental research and downside risk management are at the core of our fixed-income approach.

Calvert Managed Municipal  
Calvert Municipal Ladders  
Calvert U.S. Corporate Ladders  
Eaton Vance Preferred Security  
Parametric TABS Managed Municipal – Short (Tax-Managed)  
Parametric TABS Managed Municipal – Intermediate (Tax-Managed)  
Parametric TABS Managed Municipal – Long (Tax-Managed)  
Parametric TABS Municipal Ladders  
Parametric TABS Total Return Limited Maturity  
Parametric TABS Total Return Intermediate Maturity  
Parametric TABS Total Return Long Maturity  
Parametric U.S. Corporate Ladders

Multi-Asset

Designed specifically for high-net-worth investors, our multi-asset portfolios over a variety of solutions to pursue investment goals and maximize after-tax wealth.

Calvert Responsible Allocation Strategies  
Parametric Custom Multi-Asset

ESG

Choose from a wide range of actively managed and passive ESG strategies to help build a diverse portfolio.

Atlanta Capital High Quality Calvert Equity  
Calvert International Equity (ADR)  
Calvert International Responsible Index  
Calvert Managed Municipal  
Calvert Mid Cap  
Calvert Municipal Ladders  
Calvert Responsible Allocation Strategies  
Calvert Small/Mid Cap  
Calvert U.S. Corporate Ladders  
Calvert U.S. Large-Cap Core Responsible Index  
Calvert U.S. Large-Cap Growth Responsible Index  
Calvert U.S. Large-Cap Value Responsible Index  
Calvert U.S. Mid-Cap Core Responsible Index  
Calvert U.S. Small Cap  
Calvert’s ESG Research Global Developed Markets Equity Leaders  
Calvert’s ESG Research Global ex-U.S. Developed Markets Equity Leaders  
Calvert’s ESG Research U.S. Large-Cap Equity Leaders  
Parametric Custom Core®  
Parametric Custom Multi-Asset  
Parametric U.S. Corporate Ladders
Alternatives

Our alternative strategies offer powerful potential to enhance diversification, lower portfolio volatility and improve risk-adjusted performance.

**Parametric Option Programs**
- Parametric DeltaShift®
- Parametric Dynamic Hedged Equity
- Parametric Dynamic Put Selling (DPS)
- Parametric Option Absolute Return Strategy (OARS)
- Parametric Portfolio DeltaShift®
- Parametric Risk-Managed Put Selling (RPS)
- Parametric Tax Managed Portfolio DeltaShift

Visit our Customized Investing Center for flexible solutions from a leader in SMA investing.

**Videos**

- For investors seeking broad market exposure, is an SMA better than an ETF?
- Tax-management strategies for Appreciated portfolios

**Blogs**

Visit the Eaton Vance and Parametric blogs for timely insights on the issues that matter most to advisors and their clients.

- EATON VANCE ADVISORY BLOG
- PARAMETRIC BLOG
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