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

STRATEGY OVERVIEW

Parametric Custom Core Solutions

Parametric TABS Municipal Ladders

Focused on maximizing after-tax income and managing interest rate risk

STRATEGY OVERVIEW

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.

STRATEGY OVERVIEW

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

STRATEGY OVERVIEW

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

Tools



Parametric Advisor Tools



Investment Tax Calculator



Laddered Investing Interest Rate Scenario Tool

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





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

*Source: Cerulli Associates: The Cerulli Edge - U.S. Managed Accounts Edition. Based on AUM of Parametric Portfolio Associates, Morgan Stanley Investment Management, Atlanta Capital Management Co. and Eaton Vance among Separate Account Consultant Program Asset Management Groups, as of Q3 2023.

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