Investments

Eaton Vance offers active, passive, rules-based and responsible investing portfolios that go beyond traditional, mainstream strategies.

**Eaton Vance Funds**
Eaton Vance offers an array of mutual funds that invest across equity, income and alternative strategies.

**Morgan Stanley Investment Management Mutual Funds**
Active strategies that offer broad-based specialization and leverage Morgan Stanley’s global resources.

**Calvert Funds**
Calvert is a global leader in ESG-focused investing, offering one of the largest and most diversified families of responsibly invested mutual funds.

**Parametric Funds**
Parametric uses a scientific approach to build customized portfolios with targeted exposures that focus on controlling costs and taxes.

**Separately Managed Accounts**
Eaton Vance and its brands deliver highly customized SMA strategies to address the unique challenges of high-net-worth investors.

**Closed-End Funds and Term Trusts**
Our closed-end funds play a key role in a balanced portfolio by providing the potential for enhanced income and capital appreciation.
Highly Specialized Teams. Award-Winning Performance.


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**Tax-Equivalent Yield Calculator**

Compare yields of in-state muni bonds with out-of-state munis and taxable bonds on a tax-equivalent basis.

**Concentrated Stock Calculator**

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

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