

PRODUCT FINDER

WEALTH STRATEGIES

INVESTMENTS

INSIGHTS

TAXES AND TOOLS

Responsible Investing Center

WATCH OUR ESG INSIGHTS

Positive impact. Competitive results.

A responsible investing leader with a full range of customization options to help clients create portfolios that reflect their values and investment preferences.

As ESG investing gains momentum, Eaton Vance is ready



Industry-leading strategies

A wide range of Responsible Investing strategies with unmatched customization options supported by one of the industry's largest SMA platforms.¹



Diverse range of approaches

Client-designed portfolios, researchdriven strategies using ESG criteria and comprehensive engagement programs.



Unique strategy combinations

Use our strategies alone or together to create customized SMA solutions.

Approaches tailored to investors' values and objectives

Access strategies designed to help minimize tax liability and enhance after-tax return potential.



Research-driven strategies

As a recognized leader in Responsible Investing, Calvert uses a research-based approach and active engagement to identify opportunities and risks and drive shareholder value.

LEARN ABOUT CALVERT

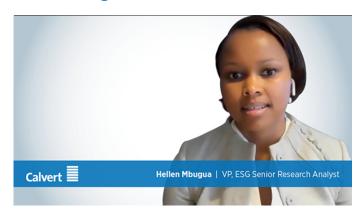


Client directed, bespoke portfolios

Parametric focuses on exercising ownership rights and specialized portfolio construction techniques to create customized portfolios that reflect client values.

LEARN ABOUT PARAMETRIC

Calvert thought leaders share their insights on Responsible Investing



Explore the advantages of a research model that focuses on a company's financially material ESG issues.

Responsible Investing

Where's the Trickle Down? Gender Diversity in Corporate Pipeline Lags the Boardroom

March 15, 2024

"The data indicate the trickle-down effect has not noticeably closed the gender diversity gap, and the pipeline issue still hampers the career advancement of women and others."

READ MORE

Responsible Investing

Bridge to ESG Integration: Country Selection in Emerging Markets

December 14, 2023

"EM countries often have weak governance institutions and poor economic freedom, which is reflected in EM valuations. But, as with many ESG issues, what matters most is the direction and rate of change."

READ MORE

ESG-focused tools

Calvert Transparency Tool

Compare strategies on a broad range of traditional portfolio characteristics and ESG metrics. The tool is free for financial professionals to use.

LEARN MORE

Related Resources

CALVERT IMPACT TOOL

See how we measure up against five key ESG factors.

Parametric ESG Analyzer

How does screening by business practice or industry sector affect a passive portfolio's ability to track a benchmark? Contact us for a free demo of our ESG Screen Analyzer.

LEARN MORE

Questions about where to start with responsible investing?

CONTACT US

Explore more Eaton Vance investing strategies

Customized Investing Center

Flexible solutions from the leader in SMA investing.

VISIT CUSTOMIZED INVESTING CENTER

Calvert Responsible Investing SMAs

A research-driven approach to identifying and evaluating financially material ESG opportunities and risks.

VISIT CALVERT RESPONSIBLE INVESTING

¹Source: 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 Q4 2023.

Advisory services described may be provided by Eaton Vance brands: Parametric Portfolio Associates LLC, Eaton Vance Management, Calvert Research and Management or Atlanta Capital Management Company, LLC; each an SEC-Registered Investment Adviser. Certain Calvert SMA strategies are only available through advisory services provided by Calvert affiliates, including Parametric Portfolio Associates LLC and Atlanta Capital Management Company, LLC. Please contact Calvert for additional information about these strategies.





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

<u>Insights</u>

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

Forms & E-Delivery

Mutual Funds & Abandoned

<u>Property</u>

Resources

DST Vision

Active Advisor

Corporate Filings

Annual Reports

Press Releases

Diversity and Inclusion

Accessibility Business Continuity Privacy & Cookies Your Privacy Choices X 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.

뎎 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 <u>download a copy here</u>. 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 <u>download a copy here</u>. To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or <u>download a copy here</u>.

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 <u>FINRA</u> / <u>SIPC</u>. Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Wednesday, May 1, 2024 6:32 AM

Page ID: 38246 - https://www.eatonvance.com/responsible-investing.php