PRODUCT FINDER ▼ Investor Account Access Investment Professional Sign In UNITED STATES



PRODUCT FINDER

WEALTH STRATEGIES

INVESTMENTS

INSIGHTS

TAXES AND TOOLS

Retirement Services

Eaton Vance has extensive experience working with financial advisors servicing the defined contribution and defined benefit market.

Thought Leadership

Explore our series on fixed-income, which will underscore how high-yield bonds have historically provided high current income with lower volatility than equities.

Explore our value-add programs and tools

- Download the Monthly Market Monitor »
- Advisory Blog
- Eaton Vance on Washington

Retirement Plan Prospector

• Download the Retirement Plan Prospector »

Past performance is no guarantee of future results.

Focused Investment Strategies

Equity

- Eaton Vance Balanced Fund
- Eaton Vance Growth Fund
- Eaton Vance Large-Cap Value Fund
- Eaton Vance Stock Fund
- Parametric International Equity Fund

Fixed Income

- Eaton Vance Floating-Rate Advantage Fund
- Eaton Vance High Income Opportunities Fund
- Eaton Vance Income Fund of Boston

RPAG and fi360 Fiduciary Score®

Build a better retirement program for your clients

RPAG and a fi360 Fiduciary Score[®] can help fiduciaries ensure that investments under their watch meet important due diligence criteria and regulatory standards in the categories including:

- Peer performance
- Portfolio management stability
- Asset class composition
- Management style consistency
- Expense ratios

New Class R6 Shares

We now offer Class R6 shares for specific funds

- Minimum initial purchase is waived for employer-sponsored retirement plans
- · Offered at net asset value to employer sponsored retirement plans and certain other
- · Not subject to any distribution, service, sub-accounting, recordkeeping or similar fees

Download: Eaton Vance R6 shares Flyer »

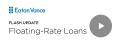
Download: Calvert R6 shares Flyer »

The following mutual funds are now offering Class R6 shares:

- Atlanta Capital Select Fund
- Balanced Fund
- Calvert Bond Fund
- Calvert Emerging Markets Equity Fund
- Calvert Equity Fund
- Calvert Floating-Rate Advantage Fund
- Calvert Ultra-Short Duration Income Fund
- Calvert US Large-Cap Core Responsible Index Fund
- Emerging Markets Debt Opportunities Fund
- Global Macro Absolute Return Fund
- Global Macro Absolute Return Advantage Fund
- Income Fund of Boston
- Large-Cap Value Fund
- Multisector Income Fund
- Parametric Emerging Markets Fund
- Parametric International Equity Fund



Investing entails risks and there can be no assurance that Eaton Vance (and its brands) will achieve profits or avoid incurring losses.

















HEADQUARTERS
One Post Office Square
Boston, MA 02110

<u>Investments</u>

Eaton Vance Funds

Parametric Funds

Calvert Funds

Separately Managed

<u>Accounts</u>

Closed-End Funds and Term Trusts

<u>Insights</u>

Advisory Blog

The BEAT

Market Update

<u>Events</u>Content for
Investment Professionals

only

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 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: Tuesday, March 5, 2024 10:50 AM

Page ID: 7274 - https://www.eatonvance.com/retirement-services-defined-benefit-defined-contribution.php

