



# For forward thinking investors.

At Eaton Vance, we focus on the future to help you stay ahead of the markets today.

We are a global asset management firm with a network of specialised investment teams engaged across asset classes, each with their own expertise and unique perspective. Our extensive research and focus on intelligent downside risk management serves professional investors with innovative strategies and services.

We have a long track record of helping professional investors prepare for market-cycle complexities with a strategic, proactive approach. This progressive mindset helps professional investors position themselves for success in today's fast-changing world.

## STRATEGIES

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### The Fed is Probably Done Hiking Rates, They Just Can't Tell Us Yet

November 28, 2023

#### **KEY POINTS**

1. In our view, the Federal Reserve (Fed) has to project a hawkish position on rate hikes to manage expectations and pave the way for eventual monetary easing.
2. Slowing inflation and the weakening labor market are signs that the Fed's past rate hikes are working.
3. Investors should ignore the noise coming out of the Fed and focus on the turning tide of U.S. economic data.



Andrew  
Szczurowski, CFA  
Head of Agency  
MBS  
Portfolio Manager

## Calvert's Approach to Investing in the Energy Transition

November 8, 2023

The energy system powers every corner of the modern economy from oil for transport and chemicals, to natural gas for heating and industry, to coal for electricity generation and steel production. Oil and gas provide over 50% of world primary energy which rises to over 80% when including coal, forming the backbone of global supply today and highlighting the magnitude of the task of an energy system transformation. This system keeps the world moving and powers economic activity, but it is prone to geopolitical disruption and price volatility. This volatility has highlighted long-term concerns that Calvert has long held about the extent to which the current global energy system relies on fossil fuels.



Tarek Soliman  
Senior ESG Research Analyst  
Calvert Research and Management



Anuj Goyal  
Senior Associate  
Calvert Research and Management

## Little Known Current Facts About U.S. Equity Investing

October 31, 2023

### KEY POINTS

1. On a three-year annualized basis, value is outperforming growth by over 3%.
2. Seeking out undervalued securities has continuously paid off for the past century.
3. We look beyond how the "Magnificent Seven" have lived up to their name this year.



Aaron Dunn, CFA  
Co-Head of Value Equity  
Portfolio Manager  
Eaton Vance Equity



Bradley Galko, CFA  
Co-Head of Value Equity  
Portfolio Manager  
Eaton Vance Equity

## INVESTMENT BRANDS

Through our investment brands, we offer active, passive, rules-based and responsible investing strategies that go beyond traditional, mainstream strategies.



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## INTERNATIONAL HEADQUARTERS

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