

Small/Mid-Cap Equity Strategy

Investment Overview

The Eaton Vance Small/Mid-Cap Equity Strategy offers exposure to a broadly diversified portfolio of high quality, small- and mid-cap companies.

Investment Philosophy

We focus on three definable inputs - Quality, Valuation, and Time (QVT). Our focus on quality drives a preference for well-entrenched franchises with durable and scalable business models, typically benefitting from either structural growth (compounders) or structural change (improvers). We believe a disciplined combination of quality in a reward-to-risk framework with a long-term mindset can uncover sources of alpha in the broad and inefficient small cap universe.

Investment People

- 6 person team with an average of 15 years experience located in Boston
- Supported by the broader Eaton Vance equity group with over 50¹ investment professionals
- Analyst-driven process with collaborative culture
- High levels of accountability, with distinct lines of responsibility
- ¹Portfolio managers, analysts, and traders including US and Global/International Equity team members.

Process

- Structured to implement our philosophy in a disciplined and repeatable reward-to-risk framework
- Designed to maximize the impact of fundamental bottom-up stock selection
- Portfolio exercises ensure team ownership, encourage collaboration, and test biases
- 1000+ company meetings per annum

Portfolio Construction

- 50 – 100 holdings²
- Quality/core bias
- Expect resilience in down markets
- Alpha driven by bottom-up stock selection
- Clearly defined risk parameters
- ²The number of securities/holdings indicated is the current range typically associated with this type of account and will vary depending on account size, client parameters and market conditions prevailing at the time of investment.

Investment Team

	Michael D. McLean, CFA Portfolio manager, Consumer Discretionary & Consumer Staples	17 years of industry experience 17 years at Eaton Vance	B.S., Providence College
	J. Griffith Noble, CFA Portfolio manager, Energy, Industrials & Materials	23 years of industry experience 7 years at Eaton Vance	B.S., University of Vermont MBA, Babson College
	Brian Hertzog Technology	20 years of industry experience 2 years at Eaton Vance	BA, Saint John's University



technology

2 years at Eaton Vance



Prachi Samudra
Financials

12 years of industry experience
4 years at Eaton Vance

B.S., Walchand College (India)
MBA, Duke University



Andrew Valk, CFA
Utilities, Industrials

13 years of industry experience
11 years at Eaton Vance

BS, Worcester State University



Ryan Cavanaugh, CFA
Health Care

6 years of industry experience
6 years at Eaton Vance

B.S., Bentley University

Benchmark

Benchmark: Russell 2500™ Index



INTERNATIONAL HEADQUARTERS

125 Old Broad Street
London, EC2N 1AR
United Kingdom

[Insights](#)

[Strategies](#)

[Funds](#)

[About](#)

[Contact](#)

[Accessibility](#) | [Privacy & Cookies](#) | [Legal Information](#) | [Terms of Use](#) | [Key Investor Information Documents](#) | [Principles for Responsible Investment](#) | [Eaton Vance's Approach to Tax](#)

Marketing Communication

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.

This website is operated by MSIM Fund Management (Ireland) Limited (MSIM FMIL). The business of Eaton Vance Global Advisors Limited was transferred to MSIM FMIL on 1 October 2021. MSIM Fund Management (Ireland) Limited has been appointed as management company of the Eaton Vance International (Ireland) Funds plc and is responsible for the distribution of the funds together with the distribution of Eaton Vance strategies and strategies of Eaton Vance affiliates. For any queries in respect of the products and strategies referred to on this website, please contact MSIM FMIL at 7-11 Sir John Rogerson's Quay, Dublin 2, D02 VC42, Ireland. MSIM FMIL is regulated by the Central Bank of Ireland with Company Number: 616661.

The value of your investment can go up or down so you may get back less than your initial investment. Past performance is not a guide to future returns.

The information on this webpage is not intended for U.S. residents. To visit our U.S. website [please click here](#).

Eaton Vance Management (Registration No. 1121368) and Parametric Portfolio Associates (Registration No. 1217626) are the registered trade marks of Eaton Vance.

Publication details: Sunday, May 05, 2024 5:18 AM

Page ID: T96427 - <https://www.eatonvance.de/smallmid-cap-equity-strategy.php>

