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[EV Forward: How Eaton Vance managers navigate today's markets](#)

[Financial quality metrics and ESG factor interactions in equity markets](#)

[YIJIA CHEN, CFA; ALEXANDER DELEON](#)
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[Parametric Global Defensive Equity Strategy: Diversification in the options portfolio](#)

Alex Zweber, CFA | October 14, 2019

In this paper, we give readers an inside look into the Parametric Global Defensive Equity Strategy and how diversification is built into the options portfolio.

[Quarterly Income Outlook: After the bond rally, beware of bond math's return](#)

Payson F. Swaffield | October 14, 2019

Investors in high-quality, longer-duration sectors have had quite a ride in 2019. It's a tough act to follow, and for those who are counting on more of the same as an encore, bond math could make it an expensive undertaking.

[Gaining a trading edge in emerging-markets debt](#)

Mike O'Brien | October 10, 2019

In this Q&A, Mike O'Brien, Director of Global Trading, offers his insights into how the trading desk seeks to add alpha to the investment process.

[Emerging markets debt-Determinants of sovereign bond quality and returns](#)

Marshall L. Stocker, Ph.D., CFA | September 23, 2019

In this paper, Eaton Vance explores the key drivers of sovereign bond ratings, spread performance and frequency of defaults for a data set of 127 countries from 2000 to 2016.

[When sustainable practices yield sustainable profits: The path to a strategic edge](#)

George Serafeim | September 23, 2019

As growing numbers of companies embrace sustainability practices, the question of whether those efforts can provide a competitive edge through strategic differentiation becomes increasingly important.

[New country research head explains how role will enhance Eaton Vance's edge in EM debt](#)

Marshall L. Stocker, Ph.D., CFA | September 09, 2019

This Q&A focuses on the recent appointment of Dr. Marshall Stocker as Director of Country Research within the Global Income team and what this means for the firm's EM debt clients.

[Volatility is likely path forward for high yield after strong advance in first half of 2019](#)

Steve Concannon, CFA; Will Reardon; Dónal Kinsella, FIA, CAIA | August 21, 2019

This Q&A focuses on recent developments in US and global high yield and the market insights of Eaton Vance's high-yield professionals. Views are correct as at 7 August 2019.

[Asian tech demystified](#)

Jean-Benoit Leblanc, M.Sc., CFA and Jean-Christophe Lermusiaux | August 16, 2019

In this article, two members of our emerging-market team demystify the composition and evolution of this sector and explain

why they consider it an attractive investment theme.

[Evaluating the Glass Ceiling](#)

Calvert Research and Management | June 28, 2019

Successful companies must be able to understand the various trends that will determine their competitive future and plan accordingly. This look at the state of gender equity continues Calvert's longtime commitment to investment research and engagement that puts gender diversity front and center.

[A far-reaching approach to emerging markets debt: Eaton Vance Emerging Markets Local Income \(EMLI\)](#)

Matthew F. Murphy, Bradford W. Godfrey | June 14, 2019

While EM local-currency debt has come a long way toward achieving mainstream status in recent years, the choice of investment approach for the sector remains key.

[Opioid exposure presents risks to pharmaceutical industry](#)

Laura Ahmadi | June 13, 2019

Calvert has evaluated the risks facing companies across this value chain, and identified three key ESG exposures we consider to be financially material for companies with exposure to opioids.

[Distilling stock-level alpha in global small-cap equities](#)

Aidan Farrell, J. Griffith Noble, CFA and Mike D. McLean | June 11, 2019

In this strategy-focused paper, we provide an in-depth look at Eaton Vance's approach to investing in the global small-cap equity sector. Specifically, we explain how our Quality, Valuation and Time investment philosophy, disciplined investment process and emphasis on bottom-up research are designed to maximise the stock-level alpha captured in portfolios.

[Parametric GDE Strategy: Where does it fit in institutional portfolios?](#)

Alex Zweber, CFA | June 04, 2019

This white paper looks at the various ways in which Parametric's versatile Global Defensive Equity Strategy can be used in an institutional portfolio.

[Proxy voting: A key tool in structured engagement](#)

Calvert Research and Management | June 03, 2019

Proper governance is foundational to corporate success; some governance structures by their very nature weaken accountability, while others are better suited to create accountability of management to the board and the board to shareholders. In our view, companies that combine good governance with corporate sustainability and social responsibility are better positioned for long-term success.

[Avoiding "diversification decay" in emerging-markets debt](#)

Michael A. Cirami, CFA; Eric Stein, CFA; John R. Baur; Matthew F. Murphy, Jr., CFA, CAIA | June 01, 2019

We believe that a better approach for investors seeking traditional EM exposure is through actively managed strategies that focus on country-level macroeconomic and political research and standalone analysis of specific risk factors such as currency, credit spreads and interest rates.

[Responsible fixed-income Investing: How Calvert delivers for asset owners](#)

Calvert Research and Management | May 27, 2019

In this paper, we outline the Calvert approach to Responsible fixed-income Investing through performance, research, active engagement and impact. It's an approach that we believe can help sophisticated investors achieve their portfolio return objectives while working toward the laudable goals of the 2006 mission statement.

[EM debt benefiting from a stronger macro, fundamental and technical backdrop](#)

Bradford Godfrey | May 17, 2019

In this Q&A, Bradford Godfrey, CFA, Director of Alternative & Asset Allocation Strategies and Institutional Portfolio Manager at Eaton Vance, discusses the firm's insights on recent developments in the emerging markets debt (EMD) universe.

[Responsible fixed-income Investing](#)

Vishal Khanduja, Brian Ellis | May 15, 2019

In this paper, we outline the Calvert approach to Responsible fixed-income Investing through performance, research, active engagement and impact. It's an approach that we believe can help sophisticated investors achieve their portfolio return objectives while working toward the laudable goals of the 2006 mission statement.

[Tools of Change: 2019 Calvert Engagement Report](#)

Calvert Research and Management | April 30, 2019

As a responsible investor, we seek to understand the challenges facing the world today, ascertain how companies are positioned to respond to those challenges and allocate capital in a manner that drives positive change. As a complement to our research, structured engagement to attempt to improve environmental and social outcomes—a well as long-term shareholder value—is a core part of our investment approach.

[Loans' quick rebound underscores their value as a strategic investment](#)

Craig Russ, Andrew Sveen, Ralph Hinckley, Christopher Remington | March 19, 2019

In this Q&A, the Eaton Vance floating-rate loan team offers perspective on the loan market's recent activity, and what it may portend for performance in 2019.

[High-yield bonds and floating-rate loans: Is indexing a sensible choice?](#)

Payson Swaffield, Christopher Remington, Marc Moran, Amir Vaziri | March 15, 2019

This study identifies and analyzes the sources of historical underperformance of index ETFs versus actively managed mutual funds in the high-yield bond and floating-rate loan fund categories, and examines whether such underperformance is likely to persist.

[Parametric Defensive Equity Strategy: Performance scenarios](#)

Alex Zweber, CFA | February 28, 2019

In this paper, we explain how Parametric's Defensive Equity (DE) strategy is constructed, its principal performance drivers and how its rules-based implementation and strict prohibition on leverage help to mitigate risk.

[January rebound in US floating-rate loans highlights pull-to-par characteristic of market](#)

John Redding, Christopher Remington | February 08, 2019

In this Q&A, John Redding, a portfolio manager in Eaton Vance's floating-rate loan team with 34 years' investment experience, shares his thoughts on the recent performance of the US\$1.1 trillion US leveraged loans market and the near-term outlook for the asset class.

[Back from the Future —12 Newspaper Headlines from 2019](#)

Edward J. Perkin | January 14, 2019

If we had a time machine and could travel back and forth between now and various dates in 2019, we think the newspaper headlines could potentially look like the list below. The intention of this list is not precision as to date or content, but to be provocative around the range of outcomes that the future may hold.

[Cash was king in 2018, but likely won't be in 2019](#)

Payson F. Swaffield | January 14, 2019

As 2018 wound to a close, some market writers got to dust off a headline that hasn't been on target for a long time: It was a year when "cash was king."

[Understanding the headwinds facing emerging market debt today](#)

Michael A. Cirami, Bradford W. Godfrey | December 18, 2018

In this Q&A, Mike Cirami, Co-Head and Portfolio Manager in Eaton Vance's Global Income Group, and Bradford Godfrey, Institutional Portfolio Manager, provide a nuanced and neutral view on the outlook for Emerging Market Debt.

[How Do GICS Sector Changes Affect Parametric's Emerging Markets Strategy?](#)

Tim Atwill | November 22, 2018

The end of September saw large changes in S&P and MSCI's commonly used Global Industry Classification System (GICS) sector methodology.

[Low-Volatility Investing: Revisiting Proven Solutions](#)

Jay H. Strohmaier | October 25, 2018

This paper revisits and updates the key conclusions from that prior work and explores the potential for blending these alternative approaches together within a portfolio.

[Eaton Vance's distinctive multi-asset credit proposition](#)

Jeffrey D. Mueller, Justin H. Bourgette, John P. Redding | October 02, 2018

Eaton Vance's multi-asset credit (MAC) capability combines allocation expertise with multi-decade expertise in fundamental credit research across multiple fixed-income asset classes.

[M&A and LBO issuers help boost new-issue supply \(and yields\) for loans](#)

Scott Page, Craig Russ, Ralph Hinckley, Christopher Remington | September 12, 2018

In this Q&A, the Eaton Vance floating-rate loan team offers its perspective on the market for the second quarter of 2018 and what may be ahead for the rest of the year.

[Fundamentals for US high yield remain strong, but likely sources of near-term volatility are increasing](#)

Michael Weilheimer, Jeff Mueller, Kelley Baccei, Steve Concannon, Will Reardon | August 16, 2018

This white paper looks at the outlook for US high yield and why the Eaton Vance high-yield team have opted for a somewhat conservative, slightly defensive investment approach at this juncture.

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Publication details: Thursday, September 30, 2021 11:10 PM
Page ID: 26095 - <https://www.eatonvance.dk/topic-papers.php>