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Eaton Vance	INSIGHTS	STRATEGIES	FUNDS	RESOURCES	ABOUT

# 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**

Fixed and floating rate income, equity and alternative strategies tailored for institutional clients ≥

**FUNDS**Equity fund solutions

## EXPERT INSIGHTS

#### HIGH CONVICTION ACTIVE

# Artificial Intelligence from a Value Perspective: Enabling the Evolution of Compute Power

April 24, 2024

#### KEY POINTS

 Al opportunity expands beyond the growth darlings that were the immediate and primary beneficiaries over the past year.
Utilities experienced the largest historical relative underperformance to the broader market in 2023; in our view, the reward relative to risk is now quite compelling for a sector that is experiencing an inflection in fundamentals.
We believe renewables, such as solar and wind, combined with battery storage, will play an increasing role in behind-the-meter power solutions.



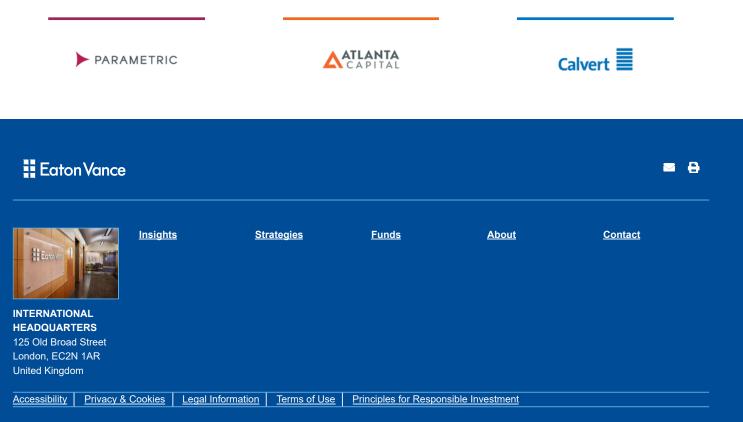


Aaron Dunn, CFA Co-Head of Value Equity Portfolio Manager Eaton Vance Equity Bradley Galko, CFA

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.



### **Marketing Communication**

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