

Emerging Markets Debt Opportunities Strategy



Monthly Strategy Profile

(as of Feb 29, 2024)

Investment Overview

A flexible approach to investing beyond benchmarks and across the full spectrum of emerging markets debt.

- Investment team of 40+ professionals focus on country-level analysis in conjunction with associated risk factors.
- Investment universe of greater than 100 countries.
- Country-pickers approach with flexibility to invest across local and external, sovereign and corporate exposures.
- Sharpe Ratio: 0.5-1.0

Portfolio Construction

- Bottom-up portfolio construction by country and risk factor in conjunction with top-down risk measurement.
- Individual positions assessed through analysis of country fundamentals, risk factor valuation, portfolio fit, and expected liquidity.
- Developed market interest-rate risk (U.S. and German) and currency risk (EUR/USD exchange rate) are hedged.

Investment Team



Marshall Stocker, PhD, CFA
Managing Director, Co-Head of Emerging
Markets

Joined investment management
industry in 1999
Joined Eaton Vance in 2013

PhD, Universidad Francisco
Marroquin
MBA, Cornell University
BS, Cornell University



John Baur
Managing Director, Co-Head of Emerging
Markets

Joined investment management
industry in 2005
Joined Eaton Vance in 2005

MBA, Cornell University
B.S., Massachusetts Institute of
Technology



Akbar Causer
Managing Director, Portfolio Manager

Joined investment management
industry in 2005
Joined Eaton Vance in 2017

MBA, Harvard Business School
BA, University of Pennsylvania



Brian Shaw, CFA
Executive Director, Portfolio Manager

Joined investment management
industry in 2007
Joined Eaton Vance in 2008

MBA, University of Chicago
BA, Vanderbilt University

Benchmark

Benchmark: J.P. Morgan EMB (JEMB) Hard Currency/Local currency 50-50

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