

Global Small-Cap Equity Strategy

Investment Overview

The Eaton Vance Global Small-Cap Equity Strategy offers exposure to a broadly diversified portfolio of high quality, global small 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 mind-set can uncover sources of alpha in the broad and inefficient small cap universe.

Investment People

Depth, expertise & location

- 13¹ person team with an average of 17 years of experience located in London, Dublin and Boston
- Supported by the broader Eaton Vance equity group with over 50² investment professionals
- Analyst - driven process within a collaborative culture
- High levels of accountability, with distinct lines of responsibility

¹ Five investment professionals are product dedicated, while the remainder have multi-strategy responsibilities. ² Portfolio managers, analysts, and traders including US and Global/International Equity team members.

Process

Bottom-up, in-depth fundamental analysis

- Structured to implement our philosophy in a disciplined and repeatable reward-to-risk framework
 - Portfolio exercises ensure team ownership, encourage collaboration, and test biases
 - Ensures all research adds value — working list, wish list, research library
 - Clearly defined portfolio construction and risk management parameters
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Portfolio Construction

Clearly defined portfolio construction

- 120-180 holdings³
- Quality/core bias
- Alpha driven by bottom-up stock selection
- Positioned for capital preservation in addition to capital appreciation

³ The 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



Aidan Farrell⁴

Managing Director, Head of Non-US
Small/Mid Capv

*Non-US Consumer, Energy, Utilities,
Financials*

Joined investment
management industry in
1996

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Publication details: Friday, April 26, 2024 8:03 AM

Page ID: T158762 - <https://www.eatonvance.jp/global-small-cap-equity-strategy.php>