

Large-Cap Growth Strategy

Investment Overview

The strategy seeks diversified growth across market sectors by investing in emerging, established, and evolving growth companies in the U.S.

- Bottom-up stock selection is the primary driver of excess returns, with every position evaluated in the context of reward vs. risk
- Employ differentiated research to identify growth outliers - stable companies with the ability to adapt and evolve
- We look for companies with: large addressable markets, unique products or services, high profitability, and strong management teams
- Target excess return: 2% to 2.5%
- Target tracking error range: 2% to 5%
- Typical average annual turnover range: 40% to 80%.

Portfolio Construction

- Typically hold 60-80 positions
- Sector weights +/- 500 basis points vs. the Russell 1000® Growth Index
- Maximum position size equal to greater of 5% or plus 2% above the largest benchmark weight
- Cash is typically held to less than 5 % of the portfolio

Investment Team



Douglas Rogers, CFA, CMT
Executive Director, Portfolio Manager

Joined investment management industry in 1999
Joined Eaton Vance in 2001

B.S., University of Florida
BS, US Naval Academy

Benchmark

Benchmark: Russell 1000® Growth Index



Marketing Communication

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