Eaton Vance

Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to investors.

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Uncovering Investing Opportunities in Periods of Sustained Inflation

By: Bradley Galko, CFA, Aaron Dunn, CFA | January 6, 2023

As interest rate hikes result in deeper discounts for growth stocks, historical data demonstrates why this is an opportune time to consider investing in value stocks.

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RESPONSIBLE INVESTING

Addressing Major Changes Relevant to Long-Term Responsible Investors

By: John Streur | May 23, 2023

Washington - As we settle into 2023, we believe long-term responsible investors focused on risk management and opportunity capture must consider material changes impacting four areas:

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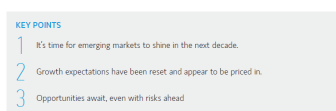
EMERGING MARKETS | EQUITIES | OUTLOOK

2023 Investment Outlook: Emerging Markets Equity

By: EV Forward | December 15, 2022

After a Tough Decade, Emerging Markets Are Ready to Shine



What We Are Seeing

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Unsere Emerging Markets und Global Income Inhalte sind auf Deutsch verfügbar.

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EQUITIES | OUTLOOK

Looking Forward with Counterpoint Global

By: Manas Gautam | December 15, 2022

This Too Shall Pass

KEY POINTS

1. While macro factors may be driving performance over the short-term, we continue to be focused on the fundamentals of our portfolio companies and their long-term compounding potential.
2. In our view, equities will likely outperform over the long term because they provide ownership in the creativity, ingenuity and productivity of hundreds of thousands of talented workers.
3. We believe a higher cost of capital will lead to fewer market entrants and less competition, which should benefit companies that have already established valuable businesses and brands.

READ MORE

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Publication details: Friday, December 30, 2022 11:36 AM
Page ID: 27591 - https://www.eatonvance.jp/viewpoints.php