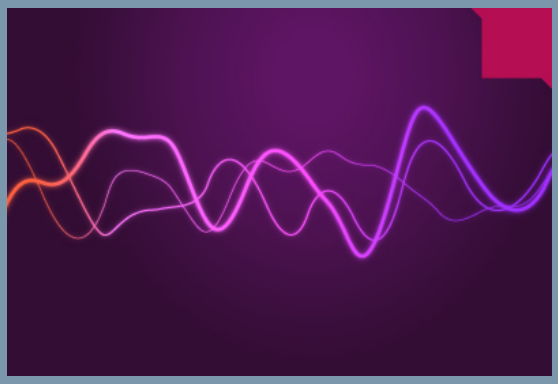
Advanced Investing

Forward-thinking investors have more advanced needs.
We provide a diverse selection of strategies and personalized wealth management solutions to meet them.

Time-tested investment principles

Deep and rewarding client experiences

Evolving strategies for changing needs



The BEAT

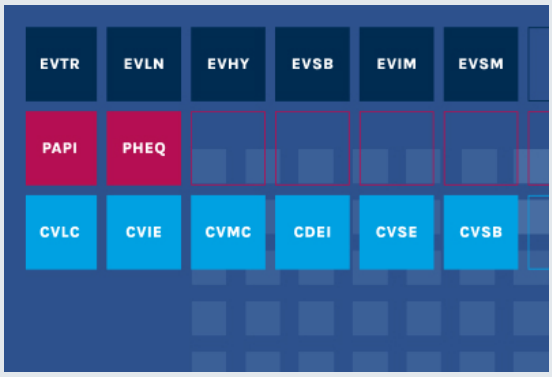
Use The BEAT as your timely resource for this month's markets. Each edition gives you ideas and insights that show you how to navigate the current investment environment.

VIEW

The Symbols of Broad-Based Specialization

What's inside your ETFs? Look inside ours, and you'll find specialized teams managing distinct strategies built for long-term results.

EXPLORE



Featured Strategies

National Municipal Income Fund (I)

EIHMX

A diversified, credit-focused approach to municipal bond investing.

$9.30	▲ $0.01

NAV as of Mar 28, 2024

Short Duration Government Income Fund (I)

EILDX

Diversified exposure to high-quality U.S. government securities—with limited interest-rate risk.

$7.23	▼ $-0.01

NAV as of Mar 28, 2024

Calvert International Equity Fund (I)

CWVIX

The Fund seeks to provide a high total return consistent with reasonable risk by investing primarily in a diversified portfolio of stocks.

$24.56	$-0.09

NAV as of Mar 28, 2024

VIEW ALL PRODUCTS

Navigating 2024: Politics, Policies and Portfolios

Want to keep your clients well-informed and focused on what they can control this election cycle? Follow a leader in tax-managed investing.

START NOW



BrokerCheck by FINRA

Morgan Stanley Investment Management Featured Strategies

Ultra-Short Income Portfolio (IN)

MUIIX

Seeks current income with capital preservation while maintaining liquidity.

Global Franchise Portfolio (I)

MSFAX

Invests bottom-up in a concentrated portfolio of high-quality, well-managed companies at a reasonable price.

US Core Portfolio (I)

MUOIX

Combines quantitative and fundamental research to identify 30-60 companies with strong investment potential.

VIEW ALL PRODUCTS

Get timely, in-depth insights from our experts to help guide investment discussions.



Advisor Institute

Strategies and commentary for advisor growth



Advisory Blog

Viewpoints from our global experts

Explore Insights >

INVESTMENT CAPABILITIES

We offer a broad range of strategies, deep experience in sustainable investing and industry-leading customization and tax management solutions.

BrokerCheck by FINRA

BrokerCheck by FINRA

Eaton Vance



HEADQUARTERS
One Post Office Square
Boston, MA 02110

Investments

- Eaton Vance Funds
- Parametric Funds
- Calvert Funds
- Separately Managed Accounts
- Closed-End Funds and Term Trusts

Insights

- Advisory Blog
- The BEAT
- Market Update Events
- The Advisor Institute

Taxes & Tools

- Investment Tax Center
- Tax Information
- Investment Tax Calculator
- Laddered Investing Interest Rate Scenario Tool
- Concentrated Stock Position Calculator
- Tax-Equivalent Yield Calculator

Resources

- Forms & E-Delivery
- Mutual Funds & Abandoned Property
- DST Vision
- Active Advisor
- Corporate Filings
- Annual Reports
- Press Releases
- Diversity and Inclusion

To report a website vulnerability, please go to Responsible Disclosure.

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

For USA PATRIOT Act Disclosure Notice please click here.

This image indicates content designed specifically for Financial Advisors / Investment Professionals. This material is not to be used with the public.

*Before investing in any Eaton Vance, Calvert or Morgan Stanley Investment Management Inc.-advised fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. Read the prospectus carefully before you invest or send money. For **open-end mutual funds**, the current prospectus contains this and other information. To obtain an **open-end mutual fund** prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or download a copy **here**. For **closed-end funds**, you should contact your financial advisor. To obtain the most recent annual and semi-annual shareholder report for a closed-end fund contact your financial advisor or download a copy **here**. To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or download a copy **here.***

*Before purchasing any **variable product**, consider the objectives, risks, charges, and expenses associated with the underlying investment option(s) and those of the product itself. For a prospectus containing this and other information, contact your investment or insurance professional. Read the prospectus carefully before investing.*

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision. The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

© Eaton Vance Management. All rights reserved.

Eaton Vance open-end mutual funds are offered through Eaton Vance Distributors, Inc. One Post Office Square, Boston, MA 02110. Member **FINRA** / **SIPC**. Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Monday, March 25, 2024 10:52 AM
Page ID: 182 - https://www.eatonvance.com/index.php

BrokerCheck by FINRA