

# Separately Managed Accounts

The Eaton Vance family of companies delivers customized, highly specialized SMA strategies to address the unique investment challenges of high-net-worth investors.

## #1

Eaton Vance's affiliates manage \$141.0B in SMA assets, the most in the industry<sup>1</sup>

## Featured strategies

STRATEGY INFORMATION

RESOURCES

### Parametric Custom Core®

Market-like equity returns, active tax management and customization

[Parametric Custom Core Brochure](#)

PARAMETRIC WEBSITE

ADVISOR TOOLS

### Parametric TABS Municipal Ladders

Focused on maximizing after-tax income and managing interest rate risk

[TABS Municipal Ladders Fact Sheet](#)

PARAMETRIC WEBSITE

MUNICIPAL BOND MARKET INSIGHT

### Parametric Corporate Ladders

Focused on generating income and managing interest rate risk

PARAMETRIC WEBSITE

CORPORATE BOND MARKET  
INSIGHT

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## Parametric TABS Managed Municipals

Actively managed municipals seeking tax-exempt income and capital preservation

[TABS Managed Municipals Short](#)

[TABS Managed Municipals Intermediate](#)

[TABS Managed Municipals Long](#)

PARAMETRIC WEBSITE

MUNICIPAL BOND MARKET INSIGHT

## All separately managed strategies

### Equity

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#### USEquity

- [Atlanta Capital High Quality Focused Growth](#)
- [Atlanta Capital High Quality Growth Plus](#)
- [Atlanta Capital High Quality Select Equity](#)
- [Atlanta Capital High Quality SMID Cap](#)
- [Atlanta Capital High Quality Small-Cap](#)
- [High Quality Calvert Equity](#)
- [Eaton Vance Focused Value Opportunities](#)
- [Eaton Vance Large-Cap Growth](#)
- [Eaton Vance Large-Cap Value](#)

## Fixed Income

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- [Eaton Vance Preferred Security](#)

### Municipal Ladders

- [Parametric TABS Municipal Ladders](#)

### Corporate Ladders

- [Parametric Corporate Ladders](#)

### Managed Municipals

- [Parametric TABS Managed Municipals Short](#)
- [Parametric TABS Managed Municipals Intermediate](#)
- [Parametric TABS Managed Municipals Long](#)

### Total Return Municipals

- [Parametric TABS Total Return Limited](#)
- [Parametric TABS Total Return Intermediate](#)
- [Parametric TABS Total Return Long](#)

## Alternative

[VIEW STRATEGIES](#) ▼

### Option Overlay Strategies

- [Parametric DeltaShift](#)
- [Parametric Dynamic Hedged Equity \(DHE\) Content for Investment Professionals only](#)
- [Parametric Option Absolute Return Strategy \(OARS\) Content for Investment Professionals only](#)
- [Parametric Portfolio DeltaShift Content for Investment Professionals only](#)
- [Parametric Risk-Managed Put Selling \(RPS\) Content for Investment Professionals only](#)

<sup>1</sup> Source: Money Management Institute & Cerulli Associates: Advisory Solutions Quarterly- 2Q 2019. SMA ranking is among Separate Account Consultant Program Asset Management Groups. Eaton Vance AUM is as of 9/30/2019 and includes advisory services offered by its affiliates.

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#### **HEADQUARTERS**

Two International Place  
Boston, MA 02110

#### **Strategies**

Eaton Vance Funds

Parametric Funds

Calvert Funds

Separately Managed Accounts

Closed-End Funds and Term Trusts

#### **Insights**

Investment Insights

Advisory Blog

Monthly Market Monitor

Eaton Vance on Washington

Market Views

The Advisor Institute

#### **Tools**

Investment Tax Calculator

Laddered Investing Interest Rate Scenario Tool

Concentrated Stock Position Calculator

Tax-Equivalent Yield Calculator

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