

A powerful combination: Morgan Stanley Investment Management + Eaton Vance

Unparalleled breadth of investments and commitment to client service

Distinctive and complementary

strengths in public and private
markets, customized solutions
and sustainable investing

Innovative, highly relevant solutions

for clients, consultants and
partners across the globe

Unwavering commitment

to investment excellence,
diversity of perspective and
differentiated values

Investment capabilities

High conviction
equities ⓘ

\$371 BILLION

Active fixed
income and
liquidity ⓘ

\$511 BILLION

Alternative
investments ⓘ

OVER \$110 BILLION

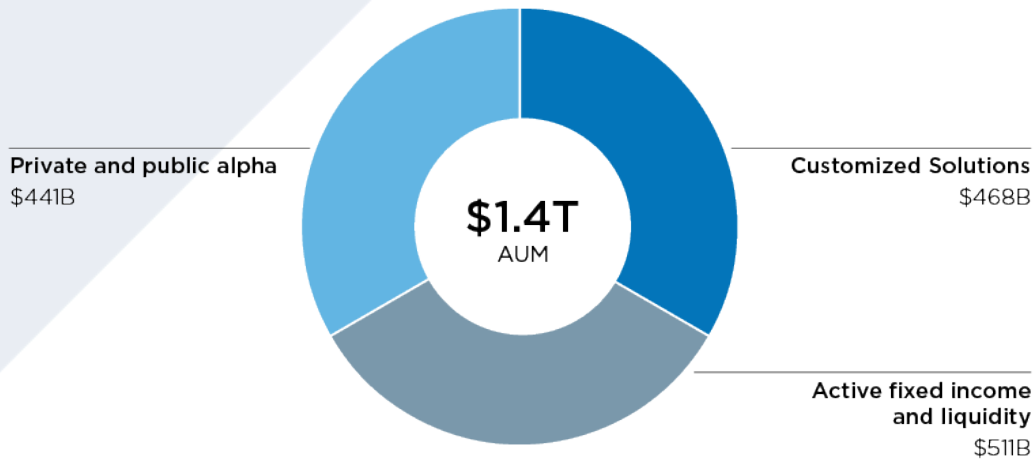
Customized
solutions ⓘ

OVER \$468 BILLION

Sustainable investing* ⓘ

OVER \$45 BILLION

Assets by investment capabilities¹



Explore Morgan Stanley Investment Management

Morgan Stanley strives to provide outstanding long-term investment performance, service and a comprehensive suite of investment management solutions to a diverse client base, which includes governments, institutions, corporations, and individuals worldwide.

[VISIT NOW](#)

[DOWNLOAD THE FACT CARD](#)

¹As of 3/31/2021. AUM includes all discretionary and non-discretionary assets of Morgan Stanley Investment Management (MSIM) and all advisory affiliates. MSIM Fund of Fund assets represent assets under management and assets under supervision. MSIM direct private investing assets represents the basis on which the firm earns management fees, not the market value of the assets owned. Alternatives investments includes fee-earning assets under management, unfunded commitments, and fund leverage, representing the total investible capital for the platform.

*Sustainable Investing includes other categories.

Investing entails risks and there can be no assurance that Eaton Vance will achieve profits or avoid incurring losses. Past performance is not a reliable indicator of future results.



HEADQUARTERS
Two International Place
Boston, MA 02110

Investments

- [Eaton Vance Funds](#)
- [Parametric Funds](#)
- [Calvert Funds](#)
- [Separately Managed Accounts](#)
- [Closed-End Funds and Term Trusts](#)

Insights

- [Advisory Blog](#)
- [Monthly Market Monitor](#)
- [Market Update Events](#)
- [Eaton Vance on Washington](#)
- [Market Views](#)
- [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

- [Mutual Fund Sales Charges](#)
- [Parametric Sales Charges](#)
- [Forms & E-Delivery](#)
- [Fund Corporate Governance](#)
- [Mutual Funds & Abandoned Property](#)
- [DST Vision](#)
- [AdvisorCentral](#)

[Accessibility](#) | [Business Continuity](#) | [Privacy & Security](#) | [Terms & Conditions](#) | [Careers](#) | [Contact](#) | [Investor Account Access](#)

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

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 fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. For open-end mutual funds, the current prospectus contains this and other information. To obtain a mutual fund prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). Read the prospectus carefully before you invest or send money. 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](#). 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. Two International Place, Boston, MA 02110. Member [FINRA](#) / [SIPC](#)

Publication details: Thursday, May 27, 2021 10:34 AM

Page ID: 37944 - <https://funds.eatonvance.com/msim-capabilities.php>