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Emerging Markets Debt Opportunities Strategy



Monthly Strategy Profile

(as of Feb 29, 2024)



Quarterly Strategy Profile

(as of Dec 31, 2023)

Investment Overview

A flexible approach to investing beyond benchmarks and across the full spectrum of emerging markets debt.

- Investment team of 40+ professionals focus on country-level analysis in conjunction with associated risk factors.
 - Investment universe of greater than 100 countries.
 - Country-pickers approach with flexibility to invest across local and external, sovereign and corporate exposures.
 - Sharpe Ratio: 0.5-1.0
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Portfolio Construction

- Bottom-up portfolio construction by country and risk factor in conjunction with top-down risk measurement.
 - Individual positions assessed through analysis of country fundamentals, risk factor valuation, portfolio fit, and expected liquidity.
 - Developed market interest-rate risk (U.S. and German) and currency risk (EUR/USD exchange rate) are hedged.
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Investment Team

	Marshall Stocker, PhD, CFA Managing Director, Co-Head of Emerging Markets	Joined investment management industry in 1999 Joined Eaton Vance in 2013	PhD, Universidad Francisco Marroquin MBA, Cornell University BS, Cornell University
	Akbar Causer Managing Director, Portfolio Manager	Joined investment management industry in 2005 Joined Eaton Vance in 2017	MBA, Harvard Business School BA, University of Pennsylvania
	Brian Shaw, CFA Executive Director, Portfolio Manager	Joined investment management industry in 2007 Joined Eaton Vance in 2008	MBA, University of Chicago BA, Vanderbilt University

Benchmark

Benchmark: J.P. Morgan EMB (JEMB) Hard Currency/Local currency 50-50

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