

Investment Affiliates

Through our five primary investment affiliates, we offer a diversity of investment approaches, encompassing bottom-up and top-down fundamental active management, responsible investing, systematic investing and customized implementation of client-specified portfolio exposures.



Fundamental active managers

History dating to 1924

Equity

- Dividend/Global Dividend
- Emerging/Frontier Markets
- Equity Option
- Global Developed
- Global ex U.S.
- Global ex U.S. Small-Cap
- Global Small-Cap
- Health Care
- Large-Cap Core
- Large-Cap Growth
- Large-Cap Value
- Multi-Cap Growth
- Real Estate
- Small-Cap
- Small/Mid-Cap
- Tax-Managed

Alternative

- Currency
- Global Macro
- Hedged Equity

Multi-Asset

- Asset Allocation
- Balanced
- Global Diversified Income
- Multi-Asset Credit

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Floating-Rate Income

Floating-Rate Loan
Municipal Floating-Rate Loan

Taxable Fixed Income

Cash Management
Core Bond/Core Plus
Emerging-Markets Debt
Global
High Yield
Inflation-Linked
Investment-Grade Corporate
Mortgage-Backed Securities
Multisector
Preferred Securities
Short Duration
Taxable Municipal
Tax-Exempt Fixed Income

Municipal Income/Tax-Advantaged

Municipal Income
Floating Rate
High Yield
National
State-Specific
Opportunistic Municipal
Tax-Advantaged Bond



PARAMETRIC

Investment science in action

Founded in 1987

Systematic Equity

Dividend
Emerging Markets
Global
Global ex U.S.
Socially Responsible
Tax-Managed
U.S.

Options-Based

Absolute Return
Covered Calls
Defensive Equity
Dynamic Hedged Equity
Put-Selling

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Systematic Alternative

Commodity

Systematic Income

Enhanced Income

Portfolio Implementation

Centralized Portfolio Management
Custom Core™
Laddered Fixed Income

Overlay Services

Overlay Services



Specialists in high-quality investing

Founded in 1969

Equity

Large-Cap Growth
Mid-Large Cap
Small-Cap
SMID-Cap

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Taxable Fixed Income

Core Bond
Intermediate Duration
Short Duration

HEXAVEST

Top-down global equity managers

Founded in 2004

Equity

Canadian
Emerging Markets
Global – All Country
Global – Developed
Global ex U.S.

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Global leader in Responsible Investing

History dating to 1976

Active Equity

Emerging Markets
Global ex U.S.
Global ex U.S. Small/Mid-Cap
Large-Cap
Mid-Cap
Small-Cap

Equity Index

Global Energy
Global ex U.S.
Global Water
U.S. Large-Cap Core
U.S. Large-Cap Growth
U.S. Large-Cap Value
U.S. Mid-Cap Core

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Alternative

Absolute Return Bond

Multi-Asset

Asset Allocation
Balanced

Floating-Rate Income

Floating-Rate Loan

Taxable Fixed Income

Core/Core Plus
Green Bond
High Yield
Long Duration
Short Duration/Ultra-Short

Tax-Exempt Income

Municipal



HEADQUARTERS

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Global Locations

Atlanta
Boston
Minneapolis
New York City
Seattle
Washington, D.C.
Westport, CT
London
Montreal
Singapore
Sydney
Tokyo

Strategies

Eaton Vance Funds
Parametric Funds
Calvert Funds
Separately Managed Accounts
Closed-End Funds and Term Trusts
Institutional Strategies
UCITS and QIAIF Funds
Offshore Funds

Services

Affiliates

Eaton Vance Management
Parametric
Atlanta Capital
Hexavest
Calvert

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Before investing in any Eaton Vance fund, prospective investors should consider carefully the fund's investment objective(s), risks, and charges and expenses. For open-end mutual funds, the fund's current prospectus contains this and other information about the fund. To obtain a mutual fund prospectus or summary prospectus, if available, 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.

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