

Viewpoints

Timely insights from portfolio managers and industry experts on key financial, economic and political issues.

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DECEMBER 30, 2020

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US small caps on pace for strong year-end finish

Boston - In November, the US small-cap Russell 2000 Index surged 18.4% — its largest monthly gain in the index's 42-year history. With this epic rise, the Russell 2000 was up more than 90% from its March bottom to set an all-time record; the last being in August 2018. So far in December, the small-cap index has tacked on another 9.4%, as investors are heartened by coronavirus vaccine distribution, despite spiking COVID losses.

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NOVEMBER 19, 2020

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US small-cap cyclicals move higher on election, virus news

Boston - Several market rotations occurred in October: US small-cap stock indexes outpaced US large-cap index returns, value strategies outperformed growth, and investors turned from the tech sector to more cyclical areas of the market. Following US elections, stocks rallied higher, boosted in part by the absence of a "blue wave" — high corporate tax hikes and major health care reform are less likely with a divided government.

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Mike McLean, CFA
Co-Director of US Small Cap Equity
Eaton Vance Management



J. Griffith Noble, CFA
Co-Director of US Small Cap Equity
Eaton Vance Management

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