

# Investment Solutions

## Active Management

- Our actively managed equity and fixed income solutions are based on rigorous, proprietary fundamental research and analysis – the pillars upon which Eaton Vance was built
- Active Management has historically outperformed passive management during periods of rising interest rates, higher volatility and market downturns
- A key potential benefit is the ability to manage risk in periods of greater uncertainty and take advantage of dislocations in the market

## Passive Management

- We offer passively managed investment solutions across asset classes, including global equity, fixed income and alternatives
- Passive Management began as simply tracking an index to gain low-cost market exposure. It has evolved over time to incorporate disciplined, rules-based ‘smart’ investment strategies for similar low-cost index exposure with potentially less risk and higher tax efficiency
- Eaton Vance affiliate Parametric Portfolio Associates is a pioneer in tax-managed investing, applying mathematic, rules-based, risk-managed methodologies to construct portfolios, customized to each client’s specific needs, which seek to maximize after-tax returns

## Actively Managed / ETF Strategies

- We leverage our fundamental, bottom-up research process used in our individual equity and fixed income strategies to create low-cost actively managed ETF strategies
- Drawing from the wide universe of ETF’s, we employ a careful screening process and identify those funds that most closely resemble the key characteristics of our active portfolios

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