



# Calvert Ultra-Short Duration Income Fund (A)

The Fund seeks to maximize income to the extent consistent with preservation of capital, through investment in short-term bonds and income-producing securities.

A Share Class

**CULAX**  
Symbol

**\$9.73** ▲\$0.00  
NAV as of Aug 12, 2022

**Fact Sheet**  
Jun 30, 2022

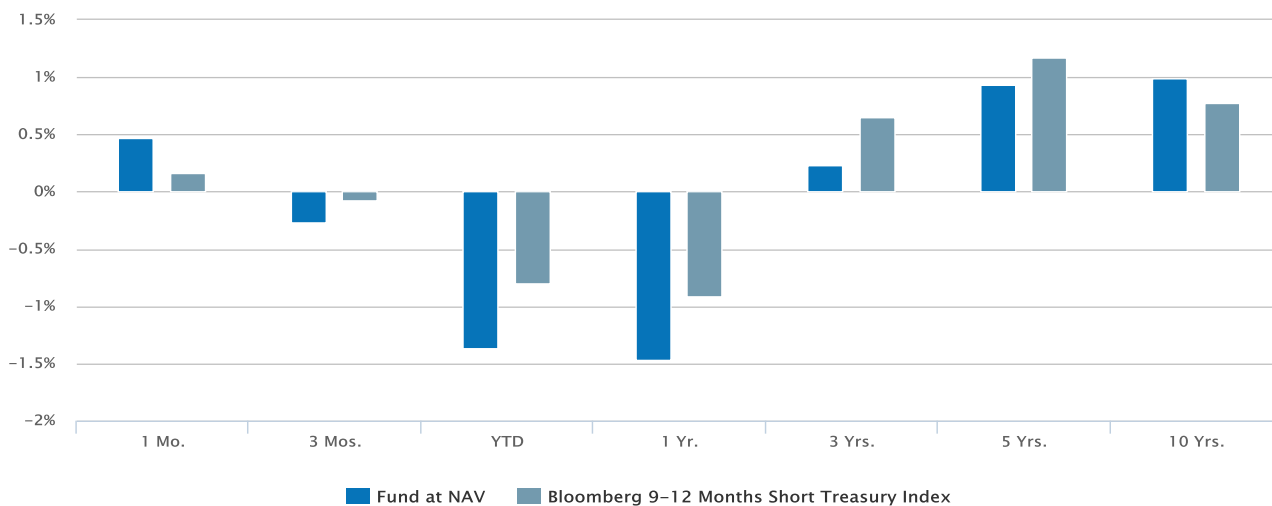
**Commentary**  
Jun 30, 2022

## Overview

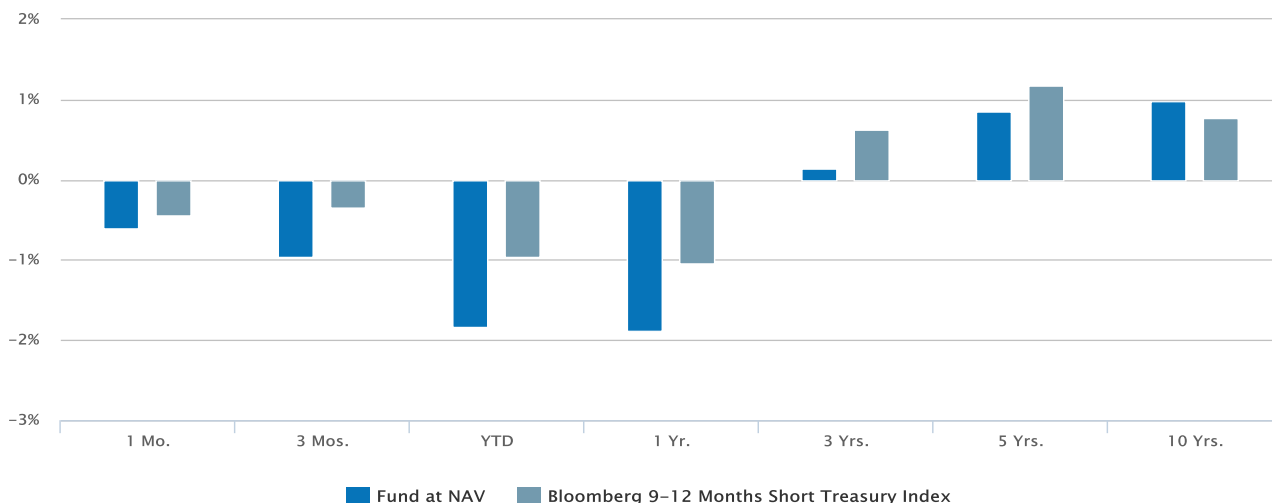
### Historical Returns (%)

as of Jun 30, 2022

07/31/2022



06/30/2022



07/31/2022

<b>Fund at NAV</b>	0.47	-0.27	-1.37	-1.47	0.23	0.93	0.99
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<b>Bloomberg 9-12 Months Short Treasury Index<sup>1</sup></b>	0.16	-0.08	-0.80	-0.91	0.65	1.17	0.78
<b>06/30/2022</b>							
<b>Fund at NAV</b>	-0.61	-0.96	-1.83	-1.88	0.14	0.85	0.98
<b>Bloomberg 9-12 Months Short Treasury Index<sup>1</sup></b>	-0.44	-0.35	-0.96	-1.05	0.63	1.17	0.77

Past performance is no guarantee of future results. Investment return and principal value will fluctuate so that shares, when redeemed, may be worth more or less than their original cost. Performance is for the stated time period only; due to market volatility, the Fund's current performance may be lower or higher than quoted. Returns are historical and are calculated by determining the percentage change in net asset value (NAV) with all distributions reinvested. Returns for other classes of shares offered by the Fund are different. Performance less than or equal to one year is cumulative. Performance prior to December 31, 2016 reflects the performance of the Fund's former adviser, Calvert Investment Management, Inc. The share class has no sales charge.

## Fund Facts

as of Jul 31, 2022

<b>Class A Inception</b>	10/31/2006
<b>Investment Objective</b>	Maximize income, to the extent consistent with preservation of capital
<b>Total Net Assets</b>	\$874.3M
<b>Minimum Investment</b>	\$1000
<b>Expense Ratio (Gross)<sup>2,3</sup></b>	0.76%
<b>Expense Ratio (Net)<sup>2,3</sup></b>	0.72%
<b>CUSIP</b>	131582611

## Top 10 Holdings (%)<sup>4</sup>

as of Jun 30, 2022

<b>United States Of America</b>	10.37
<b>Morgan Stanley Institutional Liquidity Funds - Government Portfo</b>	4.33
<b>Goldman Sachs Group Inc/The</b>	4.06
<b>Bank Of America Corp</b>	3.68
<b>JPMorgan Chase &amp; Co</b>	2.97
<b>Morgan Stanley Capital I Trust Msc_17-H1</b>	2.67
<b>Nextera Energy Inc</b>	2.30
<b>Oportun Funding Llc Optn_22-1</b>	1.74
<b>Citigroup Inc</b>	1.67
<b>Capital One Financial Corporation</b>	1.56
<b>Total</b>	<b>35.35</b>

## Portfolio Management

[Vishal Khanduja, CFA](#)

[Managed Fund since 2012](#)

[Brian S. Ellis, CFA](#)

[Managed Fund since 2015](#)

Portfolio profile subject to change due to active management. Percentages may not total 100% due to rounding. Portfolio characteristics exclude 1 security in Calvert's High Impact Investments program, which represented 0.107% of the Fund's portfolio as of 06/30/2022. High Social Impact Investments are investments that, in Calvert's opinion, offer the opportunity for significant sustainability and social impact. These investments are generally illiquid and involve high risks. See the Fund's prospectus for details and calvert.com for a complete list of Fund holdings.

## RISK CONSIDERATIONS

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market prices. The impact of the coronavirus on global markets could last for an extended period and could adversely affect the Fund's performance. No fund is a complete investment program and you may lose money investing in a fund. The Fund may engage in other investment practices that may involve additional risks and you should review the [Fund prospectus](#) for a complete description.

1. Bloomberg 9-12 Months Short Treasury Index measures the performance of U.S Treasury bills, notes, and bonds with a maturity between nine and twelve months. Unless otherwise stated, index returns do not reflect the effect of any applicable sales charges, commissions, expenses, taxes or leverage, as applicable. It is not possible to invest directly in an index. Historical performance of the index illustrates market trends and does not represent the past or future performance of the fund.

2. Source: Fund prospectus.

3. Net Expense Ratio reflects a contractual expense reimbursement that continues through 1/31/23. Without the reimbursement, if applicable, performance would have been lower.

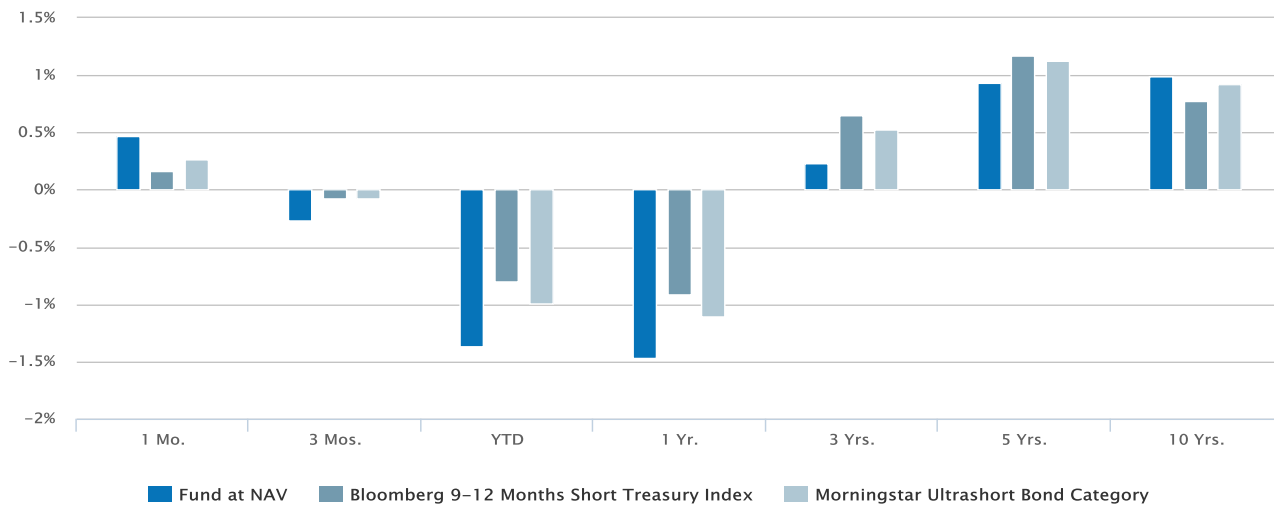
4. Percent of total net assets. Top 10 holdings exclude liquid cash vehicles but include individual cash equivalent holdings.

## Performance

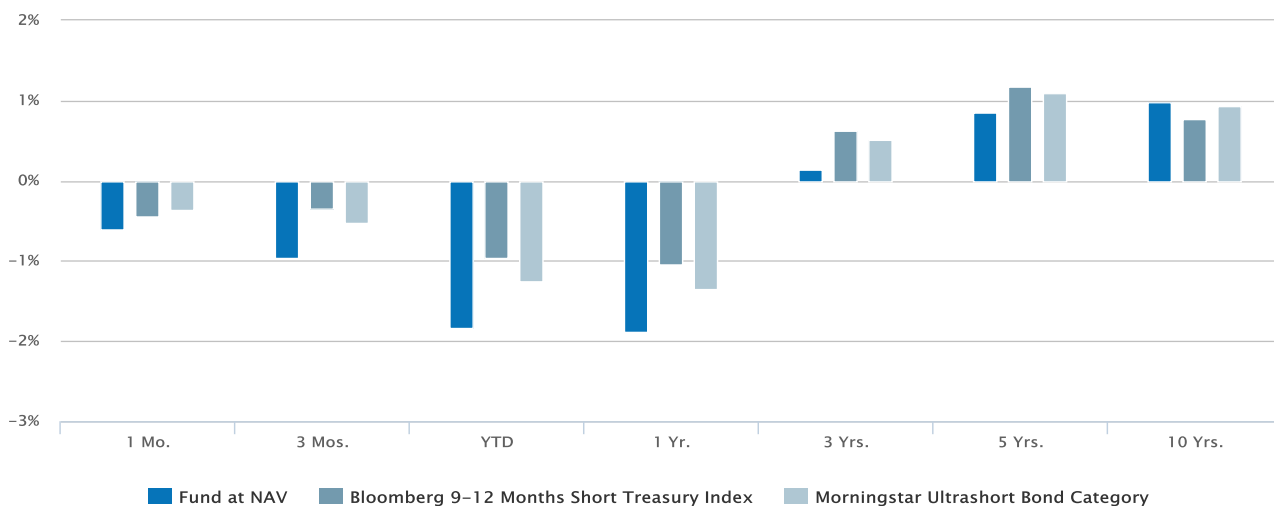
### Historical Returns (%)

as of Jun 30, 2022

07/31/2022



06/30/2022



07/31/2022

<b>Fund at NAV</b>	0.47	-0.27	-1.37	-1.47	0.23	0.93	0.99
<b>Bloomberg 9-12 Months Short Treasury Index<sup>1</sup></b>	0.16	-0.08	-0.80	-0.91	0.65	1.17	0.78
<b>Morningstar Ultrashort Bond Category<sup>5</sup></b>	0.27	-0.07	-0.99	-1.11	0.53	1.13	0.92

06/30/2022

<b>Fund at NAV</b>	-0.61	-0.96	-1.83	-1.88	0.14	0.85	0.98
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## Calendar Year Returns (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
<b>Fund at NAV</b>	2.46	0.90	0.55	0.21	1.90	1.39	1.15	3.31	0.65	0.43
<b>Bloomberg 9-12 Months Short Treasury Index<sup>1</sup></b>	0.23	0.25	0.17	0.20	0.79	0.68	1.90	2.88	1.69	0.00

## Fund Facts

<b>Expense Ratio (Gross)<sup>2,3</sup></b>	0.76%
<b>Expense Ratio (Net)<sup>2,3</sup></b>	0.72%
<b>Class A Inception</b>	10/31/2006
<b>Distribution Frequency</b>	Monthly

## Yield Information

as of Jul 31, 2022

<b>Distribution Rate at NAV</b>	1.83%
<b>Subsidized SEC 30-day Yield<sup>6</sup></b>	2.18%
<b>Unsubsidized SEC 30-day Yield</b>	2.13%

## Morningstar Rating™

as of Jul 31, 2022

Time Period	Rating	Funds in Ultrashort Bond Category
<b>Overall</b>	★★★★	217
<b>3 Years</b>	★★★	217
<b>5 Years</b>	★★★	180
<b>10 Years</b>	★★★★	93

The Morningstar Rating™ for funds, or "star rating", is calculated for managed products (including mutual funds and exchange-traded funds) with at least a three-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star.

The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics. The weights are: 100% three-year rating for 36-59 months of total returns, 60% five-year rating/40% three-year rating for 60-119 months of total returns, and 50% 10-year rating/30% five-year rating/20% three-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent three-year period actually has the greatest impact because it is included in all three rating periods. Star ratings do not reflect the effect of any applicable sales load. Hollow stars denote Morningstar Extended Performance Ratings and are considered estimates based on the performance of the fund's oldest share class, adjusted for fees and expenses.

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## NAV History<sup>7</sup>

Date	NAV	NAV Change
<b>Aug 12, 2022</b>	\$9.73	\$0.00
<b>Aug 11, 2022</b>	\$9.73	\$0.01
<b>Aug 10, 2022</b>	\$9.72	\$0.00
<b>Aug 09, 2022</b>	\$9.72	\$0.00
<b>Aug 08, 2022</b>	\$9.72	\$0.00
<b>Aug 05, 2022</b>	\$9.72	\$0.00
<b>Aug 04, 2022</b>	\$9.72	\$0.00
<b>Aug 03, 2022</b>	\$9.72	\$0.00
<b>Aug 02, 2022</b>	\$9.72	\$0.00
<b>Aug 01, 2022</b>	\$9.72	\$0.00

## Distribution History<sup>8,9</sup>

Ex-Date	Distribution	Reinvest NAV
<b>Jul 29, 2022</b>	\$0.01513	\$9.72
<b>Jun 30, 2022</b>	\$0.01014	\$9.69
<b>May 31, 2022</b>	\$0.00858	\$9.76
<b>Apr 29, 2022</b>	\$0.00696	\$9.78
<b>Mar 31, 2022</b>	\$0.00463	\$9.81
<b>Feb 28, 2022</b>	\$0.00456	\$9.85
<b>Jan 31, 2022</b>	\$0.00453	\$9.88
<b>Dec 31, 2021</b>	\$0.00443	\$9.91
<b>Nov 30, 2021</b>	\$0.00438	\$9.91
<b>Oct 29, 2021</b>	\$0.00409	\$9.93

[View All](#)

No records in this table indicates that there has not been a distribution greater than .0001 within the past 3 years.

[Fund prospectus](#)

## Capital Gain History<sup>8,9</sup>

Ex-Date	Short-Term	Long-Term	Reinvest NAV
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No records in this table indicates that there has not been a capital gain greater than .0001 within the past 3 years.

[Fund prospectus](#)

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2. Source: Fund prospectus.
3. Net Expense Ratio reflects a contractual expense reimbursement that continues through 1/31/23. Without the reimbursement, if applicable, performance would have been lower.
5. The Morningstar Ultrashort Bond Category includes funds that invest primarily in investment-grade U.S. fixed income and have durations typically less than one year.
6. SEC 30-day yield is a standardized measure based on the estimated yield to maturity of a fund's investments over a 30-day period and is based on the maximum offer price at the date specified. The SEC 30-day yield is not based on the distributions made by the fund, which may differ. Subsidized yield reflects the effect of fee waivers and expense reimbursements. Distribution Rate at NAV is calculated by dividing the last distribution paid per share (annualized) by NAV. The Fund's monthly distribution may be comprised of ordinary income, net realized capital gains and returns of capital.
7. A share split occurred on June 15, 2018.
8. A portion of the Fund's returns may be comprised of return of capital or short term capital gains. The Fund will determine the tax characteristics of all Fund distributions after the end of the calendar year and will provide shareholders such information at that time. Please consult your tax advisor for further information.
9. Distribution amounts noted for periods prior to June 15, 2018 have been restated to reflect the proportional effect of a share split that occurred at the close of business on June 15, 2018.

## Portfolio

### Asset Mix (%)<sup>10</sup>

as of Jun 30, 2022

06/30/2022

### Portfolio Statistics

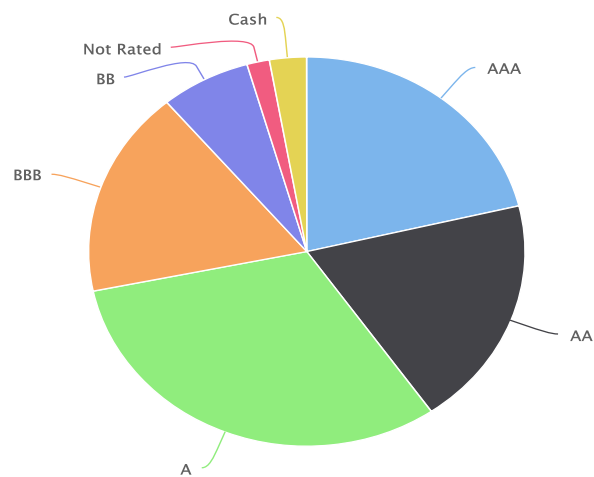
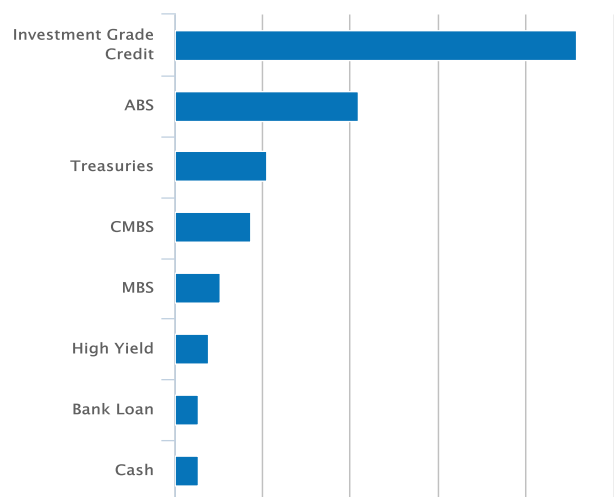
as of Jun 30, 2022

<b>Number of Holdings</b>	197
<b>Effective Duration</b>	0.56 yrs.
<b>Average Effective Maturity</b>	1.66 yrs.

### Credit Quality (%)<sup>11</sup>

as of Jun 30, 2022

06/30/2022



<b>Investment Grade Credit</b>	45.81
<b>ABS</b>	20.87
<b>Treasuries</b>	10.41
<b>CMBS</b>	8.68
<b>MBS</b>	5.10
<b>High Yield</b>	3.78
<b>Bank Loan</b>	2.62
<b>Cash</b>	2.74

<b>AAA</b>	21.23
<b>AA</b>	19.12
<b>A</b>	31.39
<b>BBB</b>	17.17
<b>BB</b>	6.68
<b>Not Rated</b>	1.67
<b>Cash</b>	2.74

Ratings are based on Moody's, S&P or Fitch, or Kroll for securitized debt instruments only (such as asset-backed securities and mortgage-backed securities), as applicable. If securities are rated differently by the ratings agencies, the highest rating is applied. Ratings, which are subject to change, apply to the creditworthiness of the issuers of the underlying securities and not to the Fund or its shares. Credit ratings measure the quality of an issuance based on the issuer's creditworthiness, with ratings ranging from AAA, being the highest, to D, being the lowest based on S&P's measures. Ratings of BBB or higher by S&P, Fitch or Kroll (Baa or higher by Moody's) are considered to be investment-grade quality. Credit ratings are based largely on the ratings agency's analysis at the time of rating. The rating assigned to any particular security is not necessarily a reflection of the issuer's current financial condition and does not necessarily reflect its assessment of the volatility of a security's market value or of the liquidity of an investment in the security. Holdings designated as "Not Rated" are not rated by the national ratings agencies stated above.

## Duration Breakdown (%)<sup>12,13</sup>

as of Jun 30, 2022

<b>0 Days - 90 Days</b>	53.64
<b>90 Days - 180 Days</b>	6.47
<b>180 Days - 1 Year</b>	19.79
<b>1 Year - 2 Years</b>	7.91
<b>2 Years - 3 Years</b>	5.75
<b>3 Years - 4 Years</b>	1.79
<b>4 Years - 5 Years</b>	1.80
<b>&gt; 5 Years</b>	0.39
<b>Total</b>	<b>99.89</b>

## Bond Composition (%)<sup>11</sup>

as of Jun 30, 2022

<b>FIXED</b>	51.27
<b>FLOAT</b>	48.73

## Assets by Country (%)<sup>12</sup>

as of Jun 30, 2022

<b>United States</b>	81.80
<b>Canada</b>	5.36
<b>United Kingdom</b>	2.89
<b>Bermuda</b>	2.00

<b>Ireland</b>	1.47
<b>Germany</b>	1.19
<b>Australia</b>	1.13
<b>Other</b>	4.17

## Fund Holdings<sup>10,14</sup>

as of Jun 30, 2022

Holding	Coupon Rate	Maturity Date	% of Net Assets
<b>MSILF GOVERNMENT PORTFOLIO</b>	0.75%	12/31/2030	4.34%
<b>United States Treasury Note/Bond</b>	0.13%	04/30/2023	3.31%
<b>United States Treasury Note/Bond</b>	0.25%	04/15/2023	2.75%
<b>United States Treasury Note/Bond</b>	0.13%	05/15/2023	2.21%
<b>United States Treasury Note/Bond</b>	0.25%	06/15/2023	1.98%
<b>Oportun Funding 2022-1 LLC</b>	3.25%	06/15/2029	1.60%
<b>Bank of America Corp</b>	1.74%	10/24/2024	1.55%
<b>JPMorgan Chase &amp; Co</b>	2.18%	02/24/2026	1.54%
<b>Theorem Funding Trust 2021-1</b>	1.21%	12/15/2027	1.41%
<b>Morgan Stanley Capital I Trust 2017-CLS</b>	2.02%	11/15/2034	1.36%

[View All](#)

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10. Percent of total net assets.

11. Percent of bond holdings.

12. Percent of total market value.

13. Duration is a measure of the expected life of a fixed-income security and its sensitivity to changes in interest rates. The longer a fund's average portfolio duration, the more sensitive the fund will be to changes in interest rates.

14. The following list reflects unaudited securities holdings (excluding derivatives positions). Holdings information may differ if



## Management



**Vishal Khanduja, CFA**  
Managing Director, Co-Head of US  
Multi-Sector

### Biography

Vishal Khanduja is the Co-Head of U.S. Multi-Sector and a portfolio manager on the Fixed Income team. He is responsible for buy and sell decisions and portfolio construction. He joined Eaton Vance in 2016. Morgan Stanley acquired Eaton Vance in March 2021.

Vishal began his career in the investment management industry in 2005. Before joining Eaton Vance, he was a senior vice president, portfolio manager and head of taxable fixed income for Calvert Investments. Previously, he was a vice president and portfolio manager at Columbia Threadneedle and associate director of fixed-income analytics at Galliard Capital.

Vishal earned a bachelor of engineering from VJTI, Mumbai, India and an MBA from the Tippie School of Management at the University of Iowa. He is a member of the CFA Institute and the CFA Society Boston. He is a CFA charterholder.

### Education

- B.Eng., Veermata Jijabai Technological Institute, Mumbai
- M.B.A., Tippie School of Management, University of Iowa

### Experience

- Managed Fund since 2012



**Brian S. Ellis, CFA**  
Executive Director, Portfolio  
Manager

### Biography

Brian Ellis is a portfolio manager on the Multi-Sector team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's Multi-Sector strategies, including Calvert Research and Management Multi-Sector strategies. He joined Eaton Vance in 2016. Morgan Stanley acquired Eaton Vance in March 2021.

Brian began his career in the investment management industry in 2006. Before joining Eaton Vance, he worked as a portfolio manager of fixed-income strategies for Calvert Investments. He was previously affiliated with Legg Mason Capital Management (now ClearBridge Investments).

Brian earned a B.S. in finance from Salisbury University. He is a CFA charterholder and an FSA credential holder. He is a member of the CFA Institute and the CFA Society Boston.

### Education

- B.S., Salisbury University

### Experience

- Managed Fund since 2015

## Literature

### Literature



#### Fact Sheet

[Download](#) - Last updated: Jun 30, 2022



#### Commentary

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## Annual Report

[Download](#) - Last updated: Sep 30, 2021



## Full Prospectus

[Download](#) - Last updated: Feb 1, 2022



## Q1 Holdings

[Download](#) - Last updated: Dec 31, 2021



## Q3 Holdings

[Download](#) - Last updated: Jun 30, 2021



## Holdings - Form N-PORT

[Download](#)



## Results of Joint Special Meeting of Shareholders of Calvert Funds

[Download](#) - Last updated: Feb 23, 2021



## Joint Special Meeting of Shareholders of Calvert Funds on February 19, 2021 Will Be A Virtual Meeting

[Download](#) - Last updated: Feb 8, 2021



## SAI

[Download](#) - Last updated: Feb 1, 2022



## Semi-Annual Report

[Download](#) - Last updated: Mar 31, 2022



## Summary Prospectus

[Download](#) - Last updated: Feb 1, 2022



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Two International Place  
Boston, MA 02110

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[Parametric Funds](#)

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