



Short Duration High Income Fund (A)

Seeks high-yield bond exposure with short duration.

A ▾

Share Class

ESHAX

Symbol

\$8.99 ▲\$0.00

NAV as of Sep 18, 2024



Fact Sheet

Jun 30, 2024

The Fund

The Fund provides exposure to the shorter duration segment of the high-yield bond market, investing primarily in investments with an expected duration profile of three years or less. Managed for total return, the Fund seeks a combination of both current income and capital appreciation potential. Managed by Eaton Vance, one of America's most experienced high-yield bond managers.

The Approach

Fundamental bottom-up credit research and top-down market analysis are the cornerstones of the Fund's approach. Invests broadly across the shorter duration high-yield bond universe, providing exposure to the high-yield market's many sectors, credit tiers and issuers. A focus on research and lower duration may help provide lower overall risk than other high-yield bond strategies.

The Features

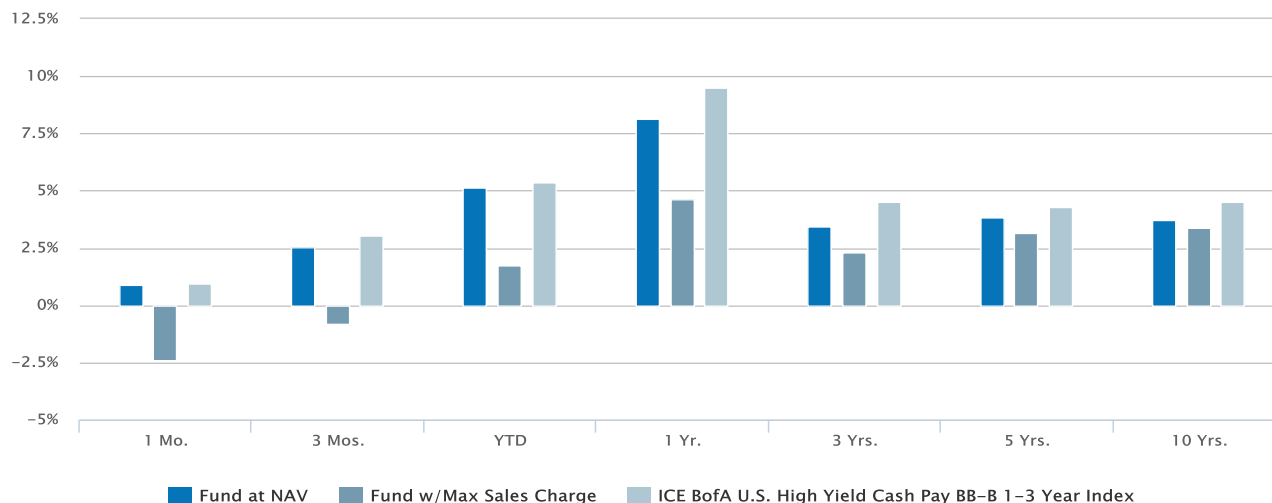
The Fund's investments in shorter duration high-yield bonds and floating-rate loans may help provide investor portfolios' a level of protection in a rising-rate environment, as investments in the Fund's universe have typically performed with low correlation to traditional bond markets. Access to a leader in high-yield bond investment management and a well-defined investment process that has been in place for over 20 years.

Overview

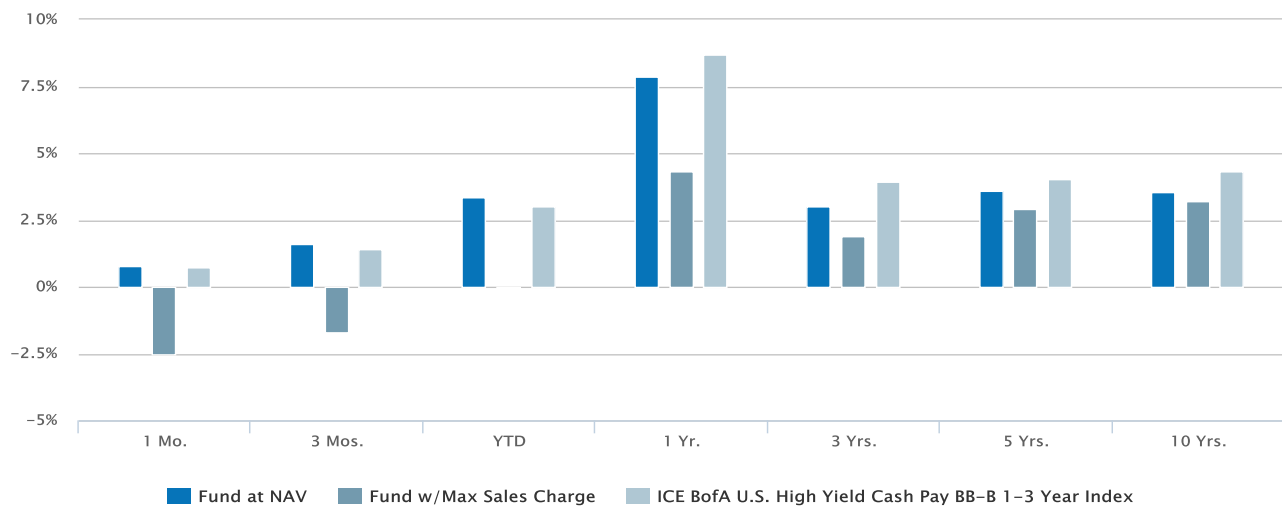
Historical Returns (%)

as of Jun 30, 2024

08/31/2024



06/30/2024



08/31/2024

Fund at NAV	0.87	2.53	5.16	8.15	3.46	3.81	3.72
Fund w/Max Sales Charge	-2.40	-0.81	1.74	4.61	2.33	3.13	3.38
ICE BofA U.S. High Yield Cash Pay BB-B 1-3 Year Index ¹	0.96	3.03	5.35	9.51	4.53	4.31	4.54

06/30/2024

Fund at NAV	0.76	1.61	3.34	7.87	3.00	3.60	3.54
Fund w/Max Sales Charge	-2.53	-1.70	-0.03	4.32	1.87	2.92	3.19
ICE BofA U.S. High Yield Cash Pay BB-B 1-3 Year Index ¹	0.75	1.41	3.02	8.71	3.92	4.05	4.32

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. Total return prior to the commencement of the class reflects returns of the Short Duration High Income Portfolio, the separate registered investment company in which the Fund invests. Prior returns are adjusted to reflect any applicable sales charge (but were not adjusted for other expenses). If adjusted for other expenses, returns would be lower. Max Sales Charge: 3.25%.

Fund Facts

as of Aug 31, 2024

Class A Inception	10/31/2013
Performance Inception	02/21/2012
Investment Objective	Total return
Total Net Assets	\$83.7M
Minimum Investment	\$1000
Expense Ratio (Gross) ²	1.15%
Expense Ratio (Net) ^{2,3}	0.91%
CUSIP	27826A854

Top 10 Issuers (%)⁴

as of Aug 31, 2024

Transdigm Inc	2.70
NCL Corporation Ltd.	2.28
Carnival Corp	1.67
Caesars Entertainment Inc	1.66
Venture Global LNG Inc	1.56
Dave & Busters Inc	1.56
Clarios Global LP	1.53
Inspire Brands Corp	1.50
Charter Communications	1.49
Vistra Operating Partners LLC	1.48
Total	17.43

Morningstar Rating™

as of Aug 31, 2024

Time Period	Rating	Funds in High Yield Bond Category
Overall	★★★★★	602
3 Years	★★★★★	602
5 Years	★★★★★	566
10 Years	★★★☆☆	432

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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Portfolio Management

Kelley Gerrity	Managed Fund since 2019
Stephen C. Concannon, CFA	Managed Fund since 2019

Portfolio profile subject to change due to active management. Percentages may not total 100% due to rounding.

RISK CONSIDERATIONS

The value of investments held by the Fund may increase or decrease in response to economic, and financial events (whether real, expected or perceived) in the U.S. and global markets. Investments in debt instruments may be affected by changes in the creditworthiness of the issuer and are subject to the risk of non-payment of principal and interest. The value of income securities also may decline because of real or perceived concerns about the issuer's ability to make principal and interest payments. Investments rated below investment grade (sometimes referred to as "junk") are typically subject to greater price volatility and illiquidity than higher rated investments. As interest rates rise, the value of certain income investments is likely to decline. The Fund's exposure to derivatives involves risks different from, or possibly greater than, the risks associated with investing directly in securities and other investments. Derivatives instruments can be highly volatile, result in leverage (which can increase both the risk and return potential of the Fund), and involve risks in addition to the risks of the underlying instrument on which the derivative is based, such as counterparty, correlation and liquidity risk. If a counterparty is unable to honor its commitments, the value of Fund shares may decline and/or the Fund could experience delays in the return of collateral or other assets held by the counterparty. The Fund is exposed to liquidity risk when trading volume, lack of a market maker or trading partner, large position size, market conditions, or legal restrictions impair its ability to sell particular investments or to sell them at advantageous 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.

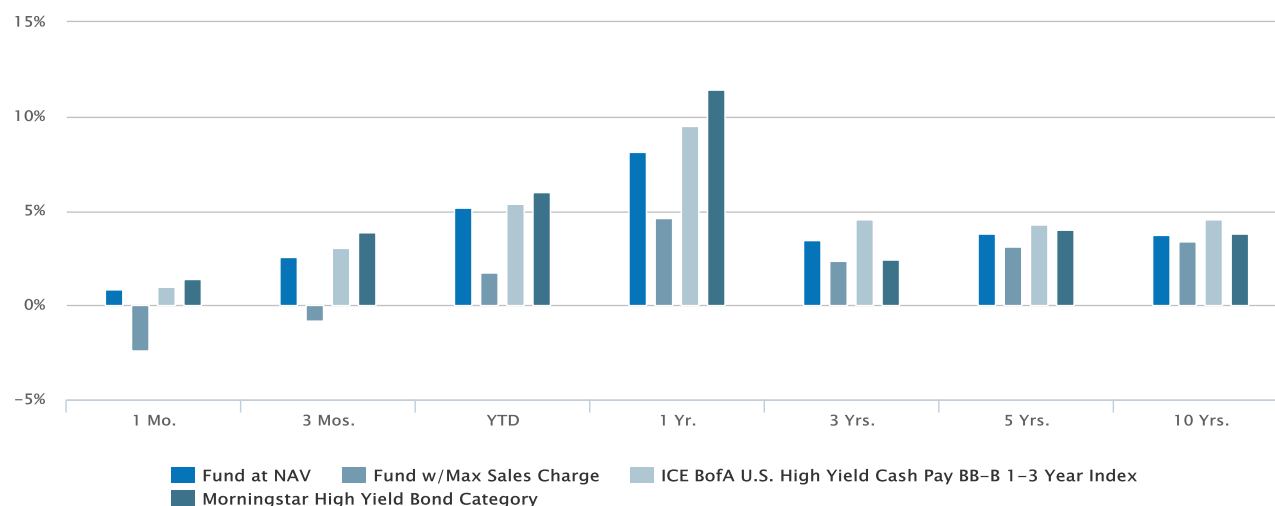
See the Fund's prospectus for information related to a primary benchmark index selected (if applicable) to comply with a regulation that requires the Fund's primary benchmark to represent the overall applicable market.

1. ICE BofA U.S. High Yield Cash Pay BB-B 1-3 Year Index is an unmanaged index of U.S. corporate bonds currently paying a coupon, rated BB1 through B3, and having a maturity less than 3 years.
2. Source: Fund prospectus.
3. Net Expense Ratio reflects a contractual expense reimbursement that continues through 3/1/25. Without the reimbursement, if applicable, performance would have been lower.
4. Percent of total net assets.

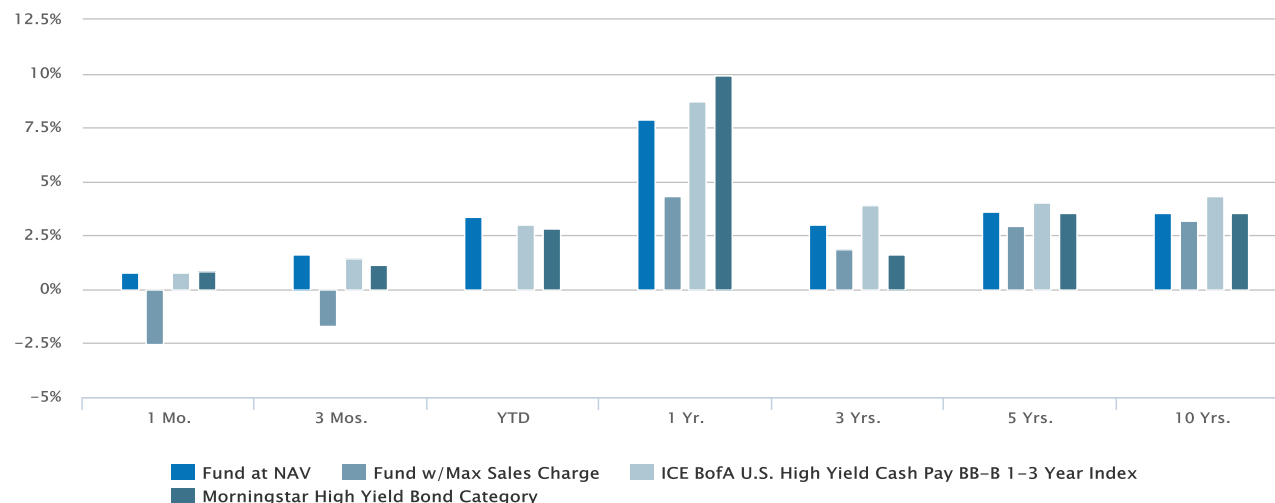
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as of Jun 30, 2024

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06/30/2024



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ICE BofA U.S. High Yield Cash Pay BB-B 1-3 Year Index ¹	0.96	3.03	5.35	9.51	4.53	4.31	4.54
Morningstar High Yield Bond Category ⁵	1.39	3.89	5.97	11.43	2.42	3.99	3.82

06/30/2024

Fund at NAV	0.76	1.61	3.34	7.87	3.00	3.60	3.54
Fund w/Max Sales Charge	-2.53	-1.70	-0.03	4.32	1.87	2.92	3.19
ICE BofA U.S. High Yield Cash Pay BB-B 1-3 Year Index ¹	0.75	1.41	3.02	8.71	3.92	4.05	4.32
Morningstar High Yield Bond Category ⁵	0.81	1.12	2.82	9.93	1.63	3.54	3.52

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Calendar Year Returns (%)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Fund at NAV	1.04	0.05	9.00	4.55	-0.66	8.43	2.86	4.63	-3.35	8.17
ICE BofA U.S. High Yield Cash Pay BB-B 1-3 Year Index ¹	1.97	0.30	10.56	4.71	2.21	8.83	2.52	4.27	-2.55	10.45

Fund Facts

Class A Inception	10/31/2013
Performance Inception	02/21/2012
Expense Ratio (Gross) ²	1.15%
Expense Ratio (Net) ^{2,3}	0.91%
Distribution Frequency	Monthly

Yield Information ⁶

as of Aug 31, 2024	
Distribution Rate at NAV	6.27%
Subsidized SEC 30-day Yield	5.77%
Unsubsidized SEC 30-day Yield	5.57%

Morningstar Rating TM

as of Aug 31, 2024

Time Period	Rating	Funds in High Yield Bond Category
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NAV History

Date	NAV	NAV Change
Sep 18, 2024	\$8.99	\$0.00
Sep 17, 2024	\$8.99	\$0.00
Sep 16, 2024	\$8.99	\$0.01
Sep 13, 2024	\$8.98	\$0.00
Sep 12, 2024	\$8.98	\$0.01

Date	NAV	NAV Change
Sep 11, 2024	\$8.97	\$0.00
Sep 10, 2024	\$8.97	-\$0.01
Sep 09, 2024	\$8.98	\$0.00
Sep 06, 2024	\$8.98	\$0.00
Sep 05, 2024	\$8.98	\$0.01

Distribution History⁷

Ex-Date	Distribution	Reinvest NAV
Aug 30, 2024	\$0.04772	\$8.98
Jul 31, 2024	\$0.04919	\$8.95
Jun 28, 2024	\$0.04732	\$8.92
May 31, 2024	\$0.04774	\$8.90
Apr 30, 2024	\$0.04728	\$8.87
Mar 28, 2024	\$0.04725	\$8.92
Feb 29, 2024	\$0.04658	\$8.89
Jan 31, 2024	\$0.04693	\$8.90
Dec 29, 2023	\$0.04739	\$8.91
Nov 30, 2023	\$0.04684	\$8.83

[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 History⁷

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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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.

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- 1. ICE BofA U.S. High Yield Cash Pay BB-B 1-3 Year Index is an unmanaged index of U.S. corporate bonds currently paying a coupon, rated BB1 through B3, and having a maturity less than 3 years.
- 2. Source: Fund prospectus.
- 3. Net Expense Ratio reflects a contractual expense reimbursement that continues through 3/1/25. Without the reimbursement, if applicable, performance would have been lower.
- 5. The Morningstar High Yield Bond Category includes funds that invest in lower-quality bonds with typically 65% or more in bonds not rated or rated BB or below by one of the major ratings agencies.
- 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 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.

Portfolio

Portfolio Statistics

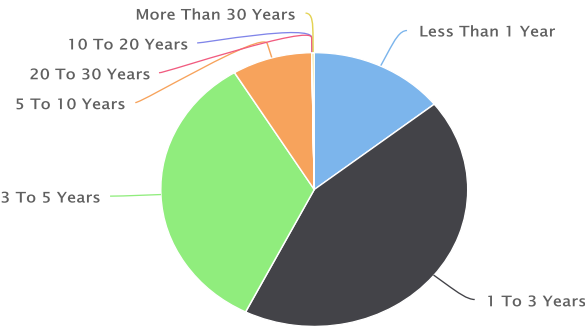
as of Aug 31, 2024

Number of Issuers	156
Average Price	\$98.87

Maturity Distribution (%)⁴

as of Aug 31, 2024

08/31/2024



Less Than 1 Year	14.28
1 To 3 Years	43.10
3 To 5 Years	33.91
5 To 10 Years	8.46
10 To 20 Years	0.00
20 To 30 Years	0.00
More Than 30 Years	0.24
Total	100.00

Assets by Country (%)^{8,9}

as of Aug 31, 2024

United States	85.65
Canada	6.03
United Kingdom	3.08
France	1.45
Other	3.80

Fund Holdings^{4,10}

as of Jul 31, 2024

Holding	Coupon Rate	Maturity Date	% of Net Assets
MSILF GOVERNMENT PORTFOLIO MSILF GOVERNMENT PORTFOLIO	5.19%	12/31/2030	1.72%
US DOLLARS			1.70%
NCL Corp Ltd	5.88%	03/15/2026	1.67%
GFL Environmental Inc	3.75%	08/01/2025	1.41%
Venture Global LNG Inc	8.13%	06/01/2028	1.30%
TransDigm, Inc.	8.60%	02/28/2031	1.29%
PetSmart, Inc.	9.18%	02/11/2028	1.23%
Alliant Holdings Intermediate LLC / Alliant Holdings Co-Issuer	6.75%	10/15/2027	1.21%
TransDigm Inc	4.63%	01/15/2029	1.21%
Connect Finco SARL / Connect US Finco LLC	6.75%	10/01/2026	1.21%

[View All](#)

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See the Fund's prospectus for information related to a primary benchmark index selected (if applicable) to comply with a regulation that requires the Fund's primary benchmark to represent the overall applicable market.

4. Percent of total net assets.
8. Holdings are presented to illustrate examples of the countries which the fund may invest using Bloomberg's country of risk methodology, and many not be representative of the fund's current or future investments.
9. Percent of total market value.
10. The following list reflects unaudited securities holdings (excluding derivatives positions). Holdings information may differ if presented as of trade date. Due to rounding, holdings of less than 0.005% may show as 0.00%. Portfolio information subject to change due to active management.

Management



Kelley Gerrity
Managing Director, Portfolio Manager

Biography

Kelley Gerrity is a portfolio manager on the High Yield team. She is responsible for buy and sell decisions, portfolio construction and risk management for the firm's high yield strategies. She joined Eaton Vance in 2005. Morgan Stanley acquired Eaton Vance in March 2021.

Kelley began her career in the investment management industry in 2000. Before joining Eaton Vance, she was the director of high-yield distressed research at Fieldstone Capital Group. Previously, she was associate director of fixed-income research at Scotia Capital Markets, Inc.

Kelley earned a B.A. from Boston College and a certificate in credit analysis from New York University.

Education

- B.A. Boston College

Experience

- Managed Fund since 2019

Other funds managed

- [Floating-Rate & High Income Fund](#)
- [High Income Opportunities Fund](#)
- [Income Fund of Boston](#)
- [Multi-Asset Credit Fund](#)



Stephen C. Concannon, CFA
Managing Director, Co-Head of High Yield
Joined Eaton Vance 2000

Biography

Stephen Concannon is the Co-Head of High Yield and a portfolio manager on the high yield team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's high yield strategies. He joined Eaton Vance in 2000; Morgan Stanley acquired Eaton Vance in March 2021.

Steve began his career in the investment management industry in 1993. Before joining Eaton Vance, he was a research analyst for Wellington Management.

Steve earned a B.A. from Bates College. He is a member of the CFA Society of Boston and is a CFA charterholder.

Education

- B.A. Bates College

Experience

- Managed Fund since 2019

Other funds managed

- [Floating-Rate & High Income Fund](#)
- [High Income Opportunities Fund](#)
- [Income Fund of Boston](#)

Literature

Literature



Fact Sheet

[Download](#) - Last updated: Jun 30, 2024



Report of Organizational Actions Affecting Basis of Securities

[Download](#) - Last updated: Jan 21, 2021



Annual Report

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Q3 Holdings

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Holdings - Form N-PORT

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