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Calvert Bond Strategy



Quarterly Strategy Profile

(as of Dec 31, 2023)


Investment Overview

- ESG-integrated strategy focused on investment grade debt securities.
- Invests solely in the securities meeting the Calvert Principles for Responsible Investment, which seek to identify companies that operate in a manner consistent with:
 - Environmental sustainability and resource efficiency
 - Equitable societies and respect for human rights
 - Accountable governance and transparent operations
- Leverages expertise of specialized teams for fundamental credit research, risk management and trading

Portfolio Construction

- Integrated proprietary ESG research with fundamental credit analysis to help manage downside risk
- Active duration and yield curve management
- Multisector investment approach
- Active sector rotation
- Average Duration: +/- 0.75 year
- Risk management focus

Investment Team

	Vishal Khanduja, CFA Managing Director, Co-Head Broad Markets Fixed Income	Joined investment management industry in 2005 Joined Calvert* in 2012	BE, VJTI, Mumbai, India MBA, University of Iowa
	Brian Ellis, CFA Executive Director, Portfolio Manager	Joined investment management industry in 2006 Joined Calvert* in 2009	BS, Salisbury University
	<i>*Years at Calvert include years at Calvert Research and Management (CRM) and years at Calvert Investment Managements (CIM).</i>		

Benchmark

- Bloomberg U.S. Aggregate Index

Disclosure

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