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Calvert Green Bond Strategy



Quarterly Strategy Profile

(as of Dec 31, 2023)

Investment Overview

ESG-integrated strategy that seeks opportunities related to climate change and other environmental issues while maximizing income and preserving capital.

- Invests solely in securities designated as "green" through our proprietary research process

Strategy Focus

At Calvert, we have developed our proprietary green criteria to try and find the best impact opportunities while enabling portfolio diversification. Our criteria includes three different types of bonds:

- Green projects - Where proceeds are directed to meeting green challenges, such as providing renewable energy resources or electric cars. Green buildings
- Solutions providers - General obligation bonds from corporate issuers who derive at least 50% of revenue from clean technology or environmentally beneficial technology, product or service, such as renewables or water efficiency technologies.
- Leaders - Issuers who demonstrate leadership in material environmental issues and, thereby, elevate industry norms.

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
**Years at Calvert include years
at Calvert Research and
Management (CRM) and years
at Calvert Investment
Managements (CIM).*

Benchmark

- ICE BofA Green Bond Index (USD Hedged)

Disclosure

Calvert Research and Management is an SEC registered investment adviser and wholly owned subsidiary of Eaton Vance Management.

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