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# Calvert Ultra-Short Duration Bond Strategy

## Investment Overview

ESG-integrated strategy that seeks a positive absolute return investing in the front end of the yield curve.

- 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
- Seeks to minimize volatility and downside risk by limiting duration through corporate credit, securitized assets, floating-rate securities and high yield
- 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 within the front end of the yield curve
- Multisector investment approach
- Disciplined, rigorous fundamental credit research process compliments ESG research
- Active sector rotation
- Average Duration Band: 0.25-0.75 years
- Risk management focus

## Investment Team

	Vishal Khanduja, CFA <i>Managing Director, Co-Head Broad Markets Fixed Income</i>	Joined investment management industry in 2005 Joined Calvert* in 2012	BE, VJTI, Mumbai, India MBA, University of Iowa
	Brian Ellis, CFA <i>Executive Director, Portfolio Manager</i>	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 9-12 Month Short Treasury Index

## Disclosure

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