



# Calvert Floating-Rate Advantage Fund (R6)

The Fund's investment objective is to provide a high level of current income.

R6 ▾  
Share Class

**CFORX**  
Symbol

**\$8.99** ▲\$0.01  
NAV as of May 2, 2024



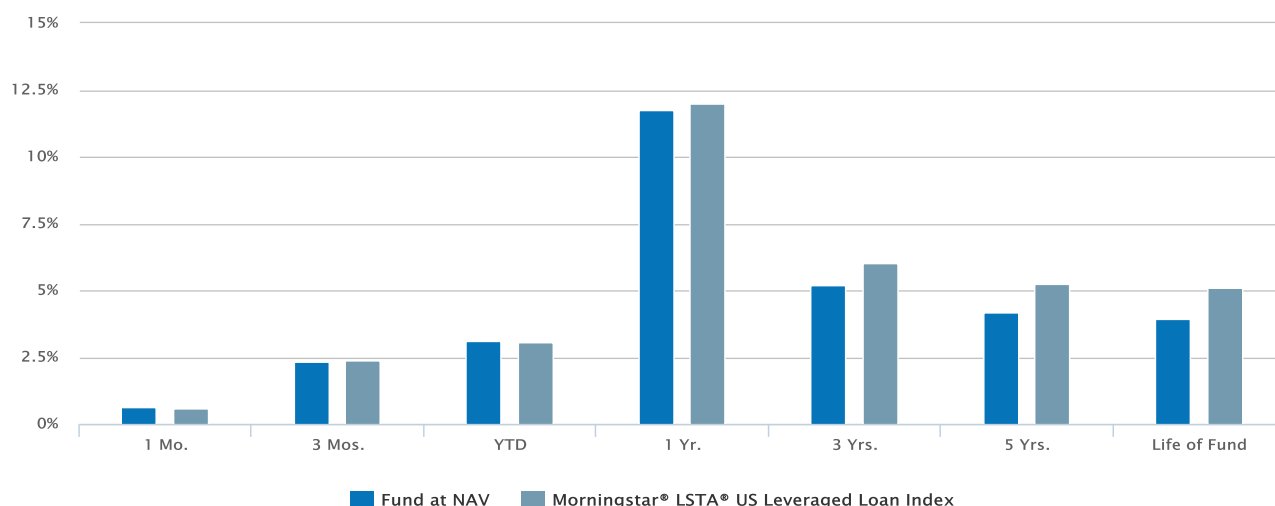
**Fact Sheet**  
Mar 31, 2024

## Overview

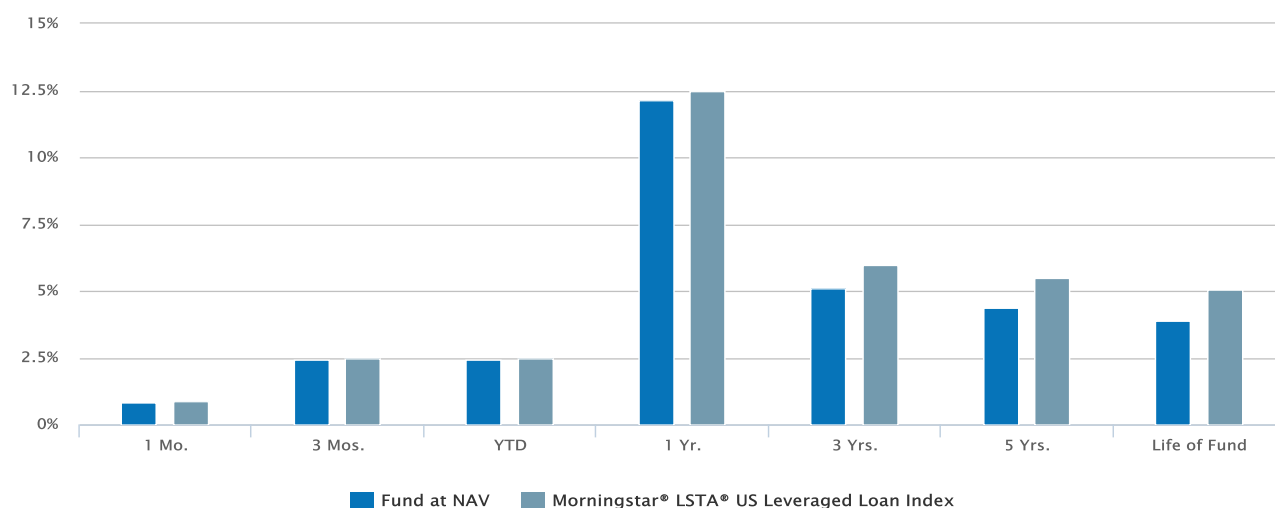
## Historical Returns (%)

as of Mar 31, 2024

**04/30/2024**



**03/31/2024**



**04/30/2024**

Fund at NAV	0.65	2.32	3.11	11.77	5.17	4.18	3.94
Morningstar® LSTA® US Leveraged Loan Index <sup>1</sup>	0.60	2.38	3.07	11.97	6.02	5.26	5.08

03/31/2024

Fund at NAV	0.81	2.45	2.45	12.12	5.08	4.37	3.89
Morningstar® LSTA® US Leveraged Loan Index <sup>1</sup>	0.85	2.46	2.46	12.47	5.99	5.47	5.05

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. The share class has no sales charge.

## Fund Facts

as of Mar 31, 2024

Class R6 Inception	11/06/2017
Investment Objective	High current income
Total Net Assets	\$101.4M
Minimum Investment	\$5000000
Expense Ratio (Gross) <sup>2</sup>	2.75%
Expense Ratio (Net) <sup>2,3</sup>	2.57%
Adjusted Expense Ratio (Gross)	0.99%
Adjusted Expense Ratio (Net)	0.81%
CUSIP	13161X865

Adjusted Expense Ratios excludes certain investment expenses such as interest expense from borrowings and repurchase agreements and dividend expense from short sales, incurred directly by the Fund or indirectly through the Fund's investment in underlying Calvert Funds, if applicable none of which are paid to Calvert Funds.

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

as of Mar 31, 2024

Madison IAQ LLC	1.29
Asurion LLC	1.09
American Airlines Inc.	1.08
Level 3 Financing Inc.	1.08
Applied Systems Inc.	1.04
Avantor Funding Inc.	0.96
Vertical US Newco Inc	0.96
MI Windows and Doors LLC	0.94
Epicor Software Corporation	0.93
W.R. Grace & Co.-Conn.	0.88
Total	10.24

## Portfolio Management

[Catherine McDermott](#)
[Managed Fund since 2018](#)
[Andrew N. Sveen, CFA](#)
[Managed Fund since 2020](#)

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. Loans are traded in a private, unregulated inter-dealer or inter-bank resale market and are generally subject to contractual restrictions that must be satisfied before a loan can be bought or sold. These restrictions may impede the Fund's ability to buy or sell loans (thus affecting their liquidity) and may negatively impact the transaction price. It may take longer than seven days for transactions in loans to settle. Due to the possibility of an extended loan settlement process, the Fund may hold cash, sell investments or temporarily borrow from banks or other lenders to meet short-term liquidity needs. Loans may be structured such that they are not securities under securities law, and in the event of fraud or misrepresentation by a borrower, lenders may not have the protection of the anti-fraud provisions of the federal securities laws. Loans are also subject to risks associated with other types of income investments. 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 London Interbank Offered Rate or LIBOR, is used throughout global banking and financial industries to determine interest rates for a variety of financial instruments (such as debt instruments and derivatives) and borrowing arrangements. The ICE Benchmark Administration Limited, the administrator of LIBOR, ceased publishing certain LIBOR settings on December 31, 2021, and is expected to cease publishing the remaining LIBOR settings on June 30, 2023. The transition process may involve, among other things, increased volatility or illiquidity in markets for instruments that currently rely on LIBOR, such as floating-rate debt obligations. Borrowing to increase investments ("leverage") may exaggerate the effect of any increase or decrease in the value of Fund investments. Investments in foreign instruments or currencies can involve greater risk and volatility than U.S. investments because of adverse market, economic, political, regulatory, geopolitical, currency exchange rates or other conditions. 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. Investing primarily in responsible investments carries the risk that, under certain market conditions, the Fund may underperform funds that do not utilize a responsible investment strategy. 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.

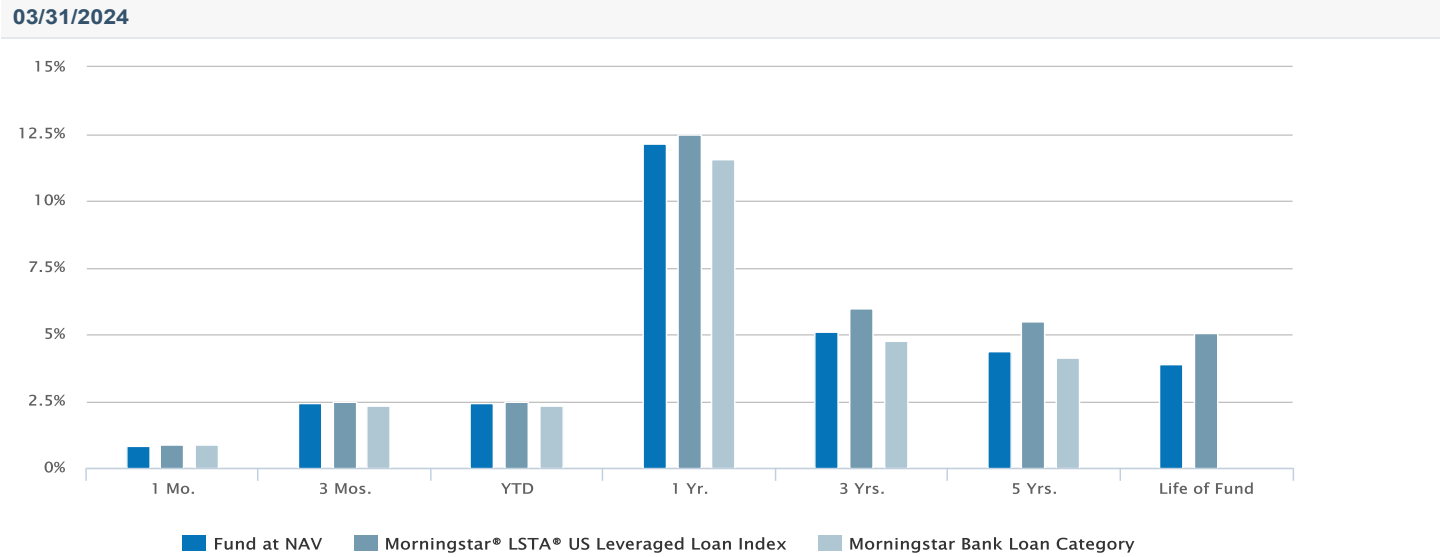
See the Fund's prospectus for information related to a primary benchmark index selected (if applicable) to comply with a regulation that requires the Fund's primary benchmark to represent the overall applicable market.

- 1. Morningstar LSTA US Leveraged Loan TR USD Index is an unmanaged index of the institutional leveraged loan market. Prior to August 29, 2022, the index name was S&P/LSTA Leveraged Loan Index. 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 2/1/25. Without the reimbursement, if applicable, performance would have been lower.
- 4. Percent of total assets.

## Performance

### Historical Returns (%)

as of Mar 31, 2024



Fund at NAV	0.81	2.45	2.45	12.12	5.08	4.37	3.89
Morningstar® LSTA® US Leveraged Loan Index <sup>1</sup>	0.85	2.46	2.46	12.47	5.99	5.47	5.05
Morningstar Bank Loan Category <sup>5</sup>	0.86	2.33	2.33	11.57	4.77	4.14	—

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### Fund Facts

Class R6 Inception 11/06/2017

### Yield Information<sup>6</sup>

as of Mar 31, 2024  
Distribution Rate at NAV 8.29%

Expense Ratio (Gross) <sup>2</sup>	2.75%	Subsidized SEC 30-day Yield	8.12%
Expense Ratio (Net) <sup>2,3</sup>	2.57%	Unsubsidized SEC 30-day Yield	8.08%
Adjusted Expense Ratio (Gross)	0.99%		
Adjusted Expense Ratio (Net)	0.81%		
Distribution Frequency	Monthly		

Adjusted Expense Ratios excludes certain investment expenses such as interest expense from borrowings and repurchase agreements and dividend expense from short sales, incurred directly by the Fund or indirectly through the Fund's investment in underlying Calvert Funds, if applicable none of which are paid to Calvert Funds.

## NAV History

Date	NAV	NAV Change
May 02, 2024	\$8.99	\$0.01
May 01, 2024	\$8.98	-\$0.01
Apr 30, 2024	\$8.99	\$0.01
Apr 29, 2024	\$8.98	\$0.00
Apr 26, 2024	\$8.98	\$0.00
Apr 25, 2024	\$8.98	\$0.00
Apr 24, 2024	\$8.98	\$0.00
Apr 23, 2024	\$8.98	\$0.01
Apr 22, 2024	\$8.97	\$0.00
Apr 19, 2024	\$8.97	\$0.00

## Distribution History<sup>7</sup>

Ex-Date	Distribution	Reinvest NAV
Apr 30, 2024	\$0.06818	\$8.99
Mar 28, 2024	\$0.06316	\$9.00
Feb 29, 2024	\$0.06592	\$8.99
Jan 31, 2024	\$0.06917	\$8.98
Dec 29, 2023	\$0.06807	\$8.98
Nov 30, 2023	\$0.07021	\$8.88
Oct 31, 2023	\$0.07002	\$8.81
Sep 29, 2023	\$0.06459	\$8.92
Aug 31, 2023	\$0.07175	\$8.94
Jul 31, 2023	\$0.06636	\$8.91

[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>7</sup>

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 2/1/25. Without the reimbursement, if applicable, performance would have been lower.

5. The Morningstar Bank Loan Category includes funds that invest primarily in floating-rate bank loans, instead of bonds, with interest payments that typically float above a common benchmark.

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.

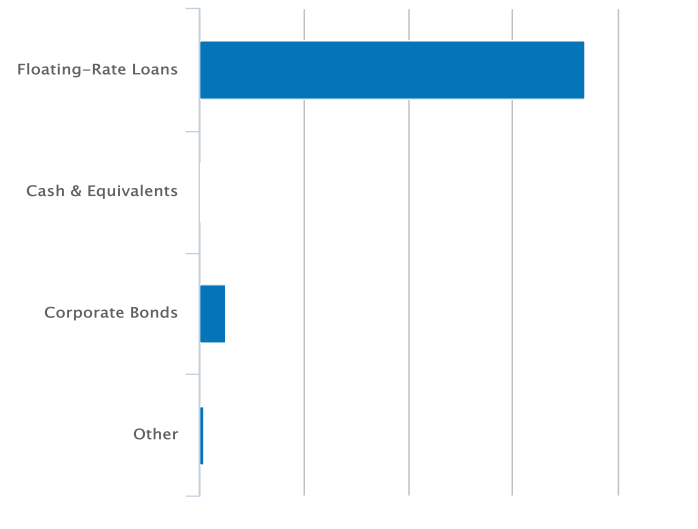
Subsidized yield reflects the effect of fee waivers and expense reimbursements. Distribution Rate at NAV is calculated by dividing the last distribution paid per share (annualized) by NAV. The Fund's monthly distribution may be comprised of ordinary income, net realized capital gains and returns of capital.

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.

Asset Mix (%)<sup>4</sup>

as of Mar 31, 2024

03/31/2024



Floating-Rate Loans	92.49
Cash & Equivalents	0.23
Corporate Bonds	6.13
Other	1.15
Total	100.00

Portfolio Statistics

as of Mar 31, 2024

Number of Loan Issuers	229
Number of Industries	50
Average Coupon	8.59%
Average Maturity	4.44 yrs.
Average Loan Size (% of TA)	0.40%
Average Loan Size	\$0.46M
Average Duration	0.30 yrs.
Average Price	\$97.81

Sector Breakdown (%)<sup>4</sup>

as of Mar 31, 2024

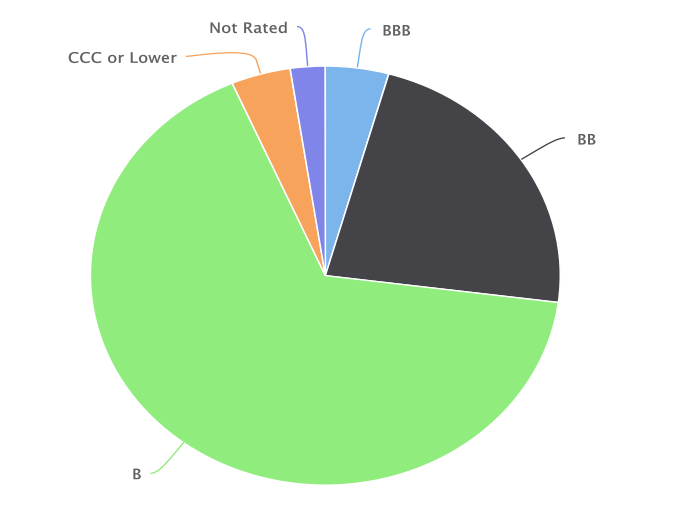
Software	15.50
Machinery	8.94
Health Care Providers & Services	4.99
Capital Markets	4.83
Insurance	4.63
Professional Services	4.20
Chemicals	3.80
Commercial Services & Supplies	3.71
Trading Companies & Distributors	3.35
Health Care Technology	2.81

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Credit Quality (%)<sup>8</sup>

as of Mar 31, 2024

03/31/2024

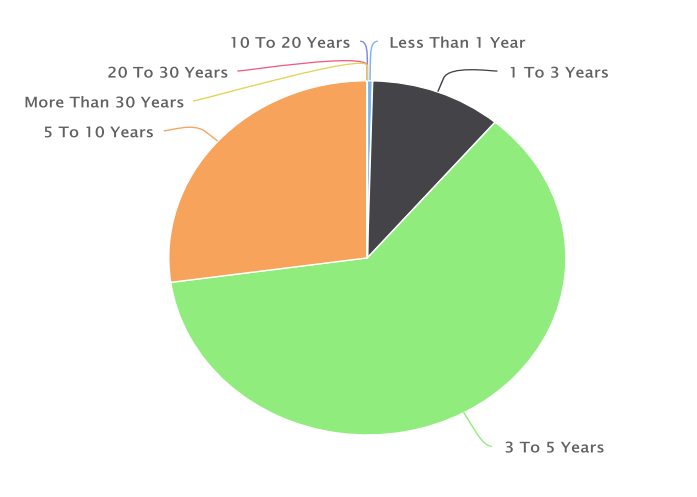


BBB	4.35
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Maturity Distribution (%)<sup>4,9</sup>

as of Mar 31, 2024

03/31/2024



BB	22.70
B	66.46
CCC or Lower	4.09
Not Rated	2.40

Credit ratings are categorized using S&P. 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 a bond 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 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 S&P.

Less Than 1 Year	0.43
1 To 3 Years	10.69
3 To 5 Years	61.67
5 To 10 Years	27.21
10 To 20 Years	0.00
20 To 30 Years	0.00
More Than 30 Years	0.00
Total	100.00

### Assets by Country (%)<sup>4</sup>

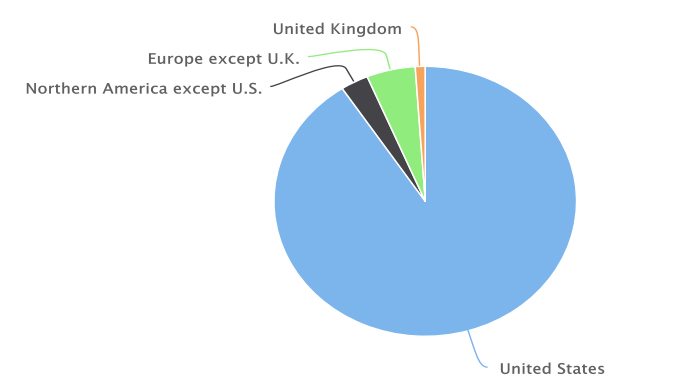
as of Mar 31, 2024

United States	90.76
Canada	2.77
Luxembourg	2.36
Netherlands	1.35
Germany	1.07
United Kingdom	1.06
Other	0.62

### Geographic Mix (%)<sup>4</sup>

as of Mar 31, 2024

03/31/2024



United States	90.76
Northern America except U.S.	2.98
Europe except U.K.	5.20
United Kingdom	1.06

### Fund Holdings<sup>10,11,12</sup>

as of Mar 31, 2024

Holding	Coupon Rate	Maturity Date	% of Net Assets
---------	-------------	---------------	-----------------

<b>US DOLLARS</b>			2.40%
<b>MSILF GOVERNMENT PORTFOLIO MSILF GOVERNMENT PORTFOLIO</b>	5.22%	12/31/2030	2.28%
<b>Applied Systems Inc</b>	8.83%	02/24/2031	1.18%
<b>Avantor</b>	7.68%	11/08/2027	1.08%
<b>Epicor</b>	8.69%	07/30/2027	1.06%
<b>TK Elevator</b>	8.79%	04/30/2030	1.04%
<b>WR Grace</b>	9.32%	09/22/2028	0.99%
<b>Minimax Viking GmbH</b>	8.19%	07/31/2028	0.99%
<b>CCC Information</b>	7.69%	09/21/2028	0.98%
<b>Les Schwab Tire Centers</b>	8.68%	11/02/2027	0.96%
<a href="#">View All</a>			

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4. Percent of total assets.

8. Percent of bond holdings.

9. The "Equity/Other" category includes securities that have no maturity date. Cash & equivalents are included within the "Less Than 1 Year" category.

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.

11. Percent of total net assets.



12. The stated interest rate represents the weighted average interest rate of all loans made under senior loan facility and includes commitment fees on unfunded loan commitments, if any, and will vary over time.

## Management



**Catherine McDermott**  
Managing Director, Portfolio Manager

### Biography

Catherine McDermott is a Portfolio Manager on the Floating-Rate Loan team. She is responsible for buy and sell decisions, portfolio construction and risk management for the firm's floating-rate loan strategies. Her focus is primarily on the automotive industry in addition to casinos, general industrial, theaters, packaging and consumer products. She joined Eaton Vance in 2000. Morgan Stanley acquired Eaton Vance in March 2021.

Catherine began her career in the investment management industry in 1988. Before joining Eaton Vance, she was a principal at Cypress Tree Investment Management and a vice president of corporate underwriting and research at Financial Security Assurance Inc.

Catherine earned a B.A., summa cum laude, from Boston College.

### Education

- B.A. Boston College

### Experience

- Managed Fund since 2018



**Andrew N. Sveen, CFA**  
Managing Director, Chairman of MSIM  
Fixed Income and Head of Floating-Rate  
Loans

### Biography

Andrew Sveen is the Chairman of MSIM Fixed Income. In addition, he is the Head of Floating-Rate Loans and a portfolio manager on the Floating-Rate Loans team. He is responsible for buy and sell decisions, portfolio construction, and risk management for the firm's floating-rate loan strategies. He joined Eaton Vance in 1999. Morgan Stanley acquired Eaton Vance in March 2021.

Andrew began his career in the investment industry in 1995. Previously at Eaton Vance, he was a Director within Loan Trading and Capital Markets. Before joining Eaton Vance, he worked as a corporate lending officer at State Street Bank.

Andrew earned a B.A. from Dartmouth College and an M.B.A. from the William E. Simon School at the University of Rochester. He also holds the Chartered Financial Analyst designation. Andrew serves as a member of the Board of Directors of the Loan Syndications and Trading Association (LSTA).

### Education

- B.A. Dartmouth College
- M.B.A. University of Rochester

### Experience

- Managed Fund since 2020

## Literature

### Literature



#### Fact Sheet

[Download](#) - Last updated: Mar 31, 2024



#### Annual Report

[Download](#) - Last updated: Sep 30, 2023



#### Full Prospectus

[Download](#) - Last updated: Feb 1, 2024



## Q1 Holdings

[Download](#) - Last updated: Dec 31, 2023



## Q3 Holdings

[Download](#) - Last updated: Jun 30, 2023



## Holdings - Form N-PORT

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## SAI

[Download](#) - Last updated: Feb 1, 2024



## Semi-Annual Report

[Download](#) - Last updated: Mar 31, 2023



## Summary Prospectus

[Download](#) - Last updated: Feb 1, 2024



### HEADQUARTERS

One Post Office Square  
Boston, MA 02110

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[Separately Managed Accounts](#)

[Closed-End Funds and Term Trusts](#)

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NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Effective January 3, 2017, Eaton Vance Distributors, Inc. replaced Calvert Investments Distributors, Inc. ("CID") as the principal underwriter following the acquisition by Calvert Research and Management ("CRM") of substantially all the business assets of Calvert Investment Management, Inc. ("CIM"). CRM has also replaced CIM as the Investment adviser. Eaton Vance Distributors, Inc. does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision.

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