

# Short Duration Inflation-Protected Income Fund (A)

Seeking real return.

A ▾

Share Class

**EARRX**

Symbol

**\$9.93** ▲\$0.01

NAV as of May 3, 2024



**Fact Sheet**

Mar 31, 2024

## The Fund

The Fund invests primarily in "inflation protected" instruments, including TIPS of varying maturities, as well as floating-rate loans and other fixed and floating-rate debt obligations where nominal interest payments are swapped for those based on changes in the U.S. Consumer Price Index (CPI) or other measures of inflation.

## The Approach

TIPS and floating-rate loans and other fixed and floating-rate debt obligations swapped for CPI or other measures of inflation receive the same inflation adjustment as other, longer-dated inflation-linked securities. As a result, they may be able to provide similar protection from inflation, but with less interest rate risk. The Fund limits its real duration to 3.5 years or less.

## The Features

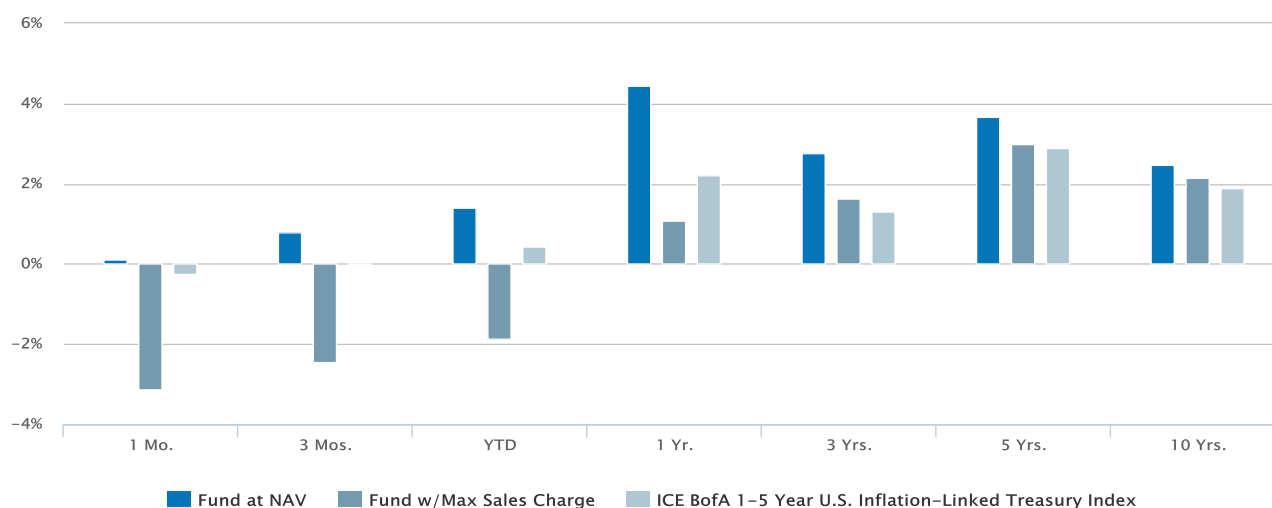
The Fund's duration is one of the shortest in its Morningstar Category. As interest rates rise, inflation-protected bond funds with longer durations can be expected to decrease in value more than those with shorter durations.

## Overview

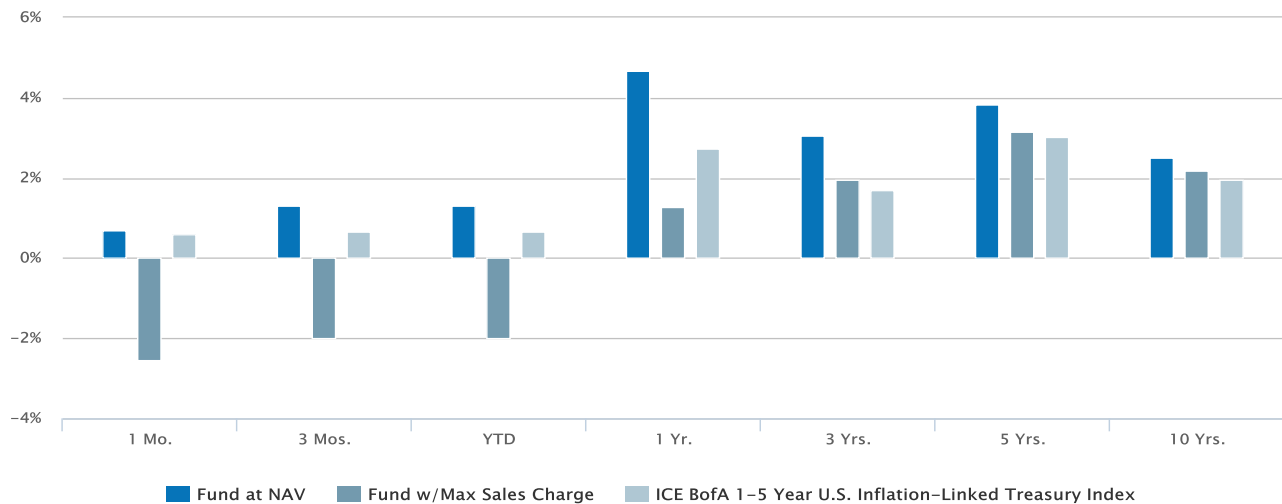
## Historical Returns (%)

as of Mar 31, 2024

**04/30/2024**



**03/31/2024**



#### 04/30/2024

Fund at NAV	0.10	0.80	1.42	4.45	2.76	3.67	2.48
Fund w/Max Sales Charge	-3.13	-2.45	-1.88	1.08	1.62	2.99	2.14
ICE BofA 1-5 Year U.S. Inflation-Linked Treasury Index <sup>1</sup>	-0.23	-0.03	0.42	2.20	1.30	2.88	1.89

#### 03/31/2024

Fund at NAV	0.70	1.32	1.32	4.66	3.05	3.84	2.51
Fund w/Max Sales Charge	-2.55	-1.98	-1.98	1.27	1.94	3.15	2.17
ICE BofA 1-5 Year U.S. Inflation-Linked Treasury Index <sup>1</sup>	0.60	0.66	0.66	2.72	1.69	3.02	1.97

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. Max Sales Charge: 3.25%.

## Fund Facts

as of Mar 31, 2024

Class A Inception	03/31/2010
Investment Objective	Real return
Total Net Assets	\$486.4M
Minimum Investment	\$1000
Expense Ratio (Gross) <sup>2</sup>	1.28%
Expense Ratio (Net) <sup>2,3</sup>	1.15%
Adjusted Expense Ratio (Gross)	0.88%
Adjusted Expense Ratio (Net)	0.75%
CUSIP	277905378

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 Eaton Vance Funds, if applicable none of which are paid to Eaton Vance.

## Portfolio Management

[Brian S. Ellis, CFA](#)

[Managed Fund since 2019](#)

[Jason C. DesLauriers, CFA](#)

[Managed Fund since 2019](#)

Portfolio profile subject to change due to active management. Percentages may not total 100% due to rounding. Fund primarily invests in one or more affiliated investment companies (Portfolios) and may also invest directly. Unless otherwise noted, references to investments are to the aggregate holdings of the Fund, including its pro rata share of each Portfolio or Fund in which it invests.

## 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. Interest payments on inflation-linked investments may vary widely and will fluctuate as principal and interest are adjusted for inflation. Investments in inflation-linked investments may lose value in the event that the actual rate of inflation is different than the rate of the inflation index. 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. As interest rates rise, the value of certain income investments is likely to decline. Mortgage- and asset-backed securities are subject to credit, interest rate, prepayment and extension risk. 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. 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. A nondiversified fund may be subject to greater risk by investing in a smaller number of investments than a diversified fund. 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.

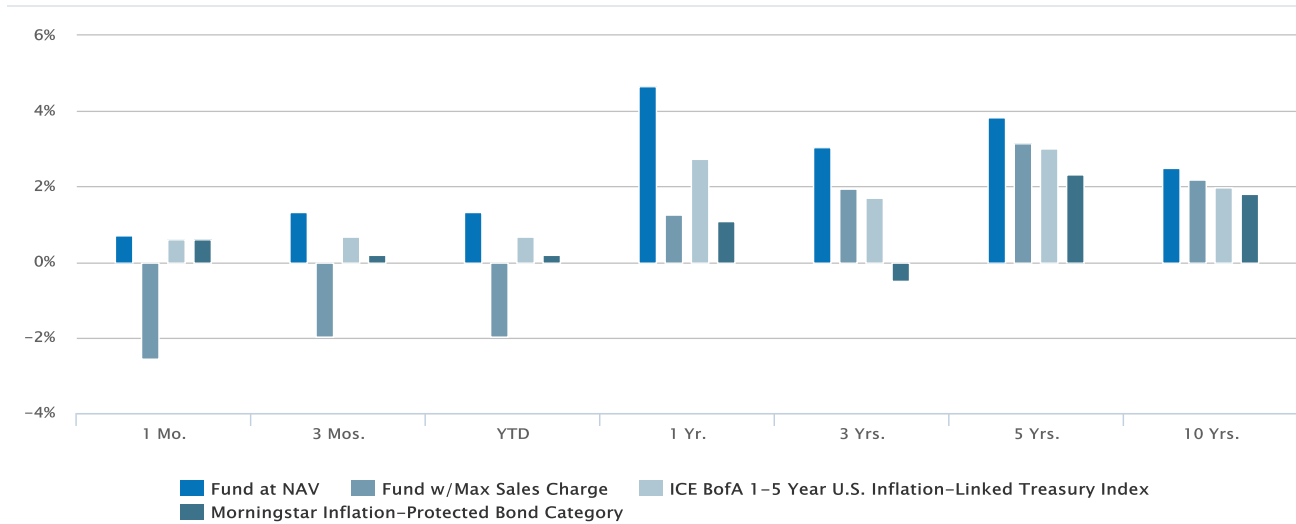
- 1. ICE BofA 1-5 Year U.S. Inflation-Linked Treasury Index is an unmanaged index comprised of U.S. Treasury Inflation-Protected Securities with at least \$1 billion in outstanding face value and a remaining term to final maturity of at least 1 year and less than 5 years.
- 2. Source: Fund prospectus.
- 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.

## Performance

### Historical Returns (%)

as of Mar 31, 2024

03/31/2024



Fund at NAV	0.70	1.32	1.32	4.66	3.05	3.84	2.51
Fund w/Max Sales Charge	-2.55	-1.98	-1.98	1.27	1.94	3.15	2.17
ICE BofA 1-5 Year U.S. Inflation-Linked Treasury Index <sup>1</sup>	0.60	0.66	0.66	2.72	1.69	3.02	1.97
Morningstar Inflation-Protected Bond Category <sup>4</sup>	0.60	0.19	0.19	1.10	-0.50	2.33	1.80

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## Calendar Year Returns (%)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Fund at NAV	-2.00	-1.10	5.80	1.80	-0.49	5.28	5.04	7.49	-3.20	5.96
ICE BofA 1-5 Year U.S. Inflation-Linked Treasury Index <sup>1</sup>	-1.06	-0.15	3.16	0.82	0.40	5.07	5.69	5.51	-3.99	4.32

## Fund Facts

Class A Inception	03/31/2010
Expense Ratio (Gross) <sup>2</sup>	1.28%
Expense Ratio (Net) <sup>2,3</sup>	1.15%
Adjusted Expense Ratio (Gross)	0.88%
Adjusted Expense Ratio (Net)	0.75%
Distribution Frequency	Quarterly

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 Eaton Vance Funds, if applicable none of which are paid to Eaton Vance.

## Yield Information <sup>5,6</sup>

as of Mar 31, 2024

Distribution Rate at NAV	2.40%
Subsidized SEC 30-day Yield	9.51%
Unsubsidized SEC 30-day Yield	9.31%

## Morningstar Rating <sup>TM</sup>

as of Mar 31, 2024

Time Period	Rating	Funds in Inflation-Protected Bond Category
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Overall	★★★★★	203
3 Years	★★★★★	203
5 Years	★★★★★	195
10 Years	★★★★★	139

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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## NAV History

Date	NAV	NAV Change
May 03, 2024	\$9.93	\$0.01
May 02, 2024	\$9.92	\$0.02
May 01, 2024	\$9.90	\$0.00
Apr 30, 2024	\$9.90	-\$0.01
Apr 29, 2024	\$9.91	\$0.01
Apr 26, 2024	\$9.90	\$0.01
Apr 25, 2024	\$9.89	-\$0.01
Apr 24, 2024	\$9.90	\$0.00
Apr 23, 2024	\$9.90	\$0.01
Apr 22, 2024	\$9.89	\$0.00

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

Ex-Date	Distribution	Reinvest NAV
Mar 27, 2024	\$0.05930	\$9.89
Dec 28, 2023	\$0.12010	\$9.82
Sep 28, 2023	\$0.09950	\$9.71
Jun 29, 2023	\$0.13860	\$9.69
Mar 30, 2023	\$0.05840	\$9.84
Dec 29, 2022	\$0.06570	\$9.67
Sep 29, 2022	\$0.17500	\$9.60
Jun 29, 2022	\$0.14720	\$9.98
Mar 30, 2022	\$0.07830	\$10.47

Ex-Date	Distribution	Reinvest NAV
Dec 30, 2021	\$0.06810	\$10.48

[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>

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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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. The Morningstar Inflation-Protected Bond Category includes funds that invest primarily in bonds that adjust their principal value with the rate of inflation.

5. 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.

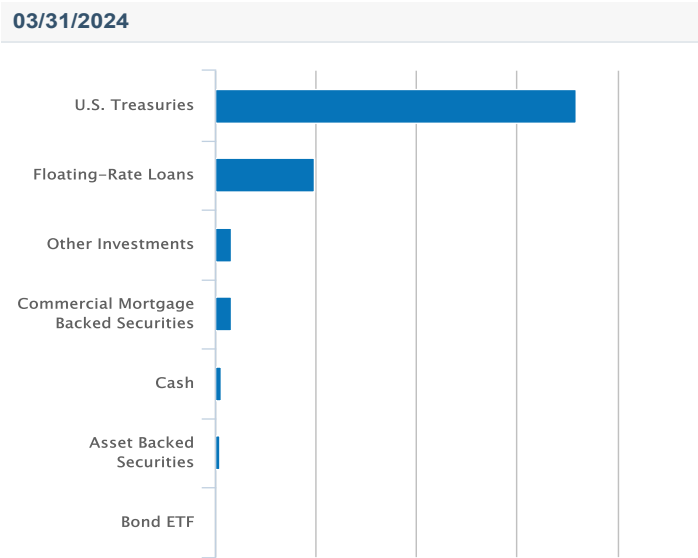
6. The Fund invests in Treasury Inflation-Protected Securities (TIPS), and the SEC 30-day yield of the Fund, as quoted above, includes the positive or negative monthly change in inflation (U.S. Consumer Price Index (Not Seasonally Adjusted)). When the monthly change in inflation is positive, the Fund's SEC 30-day yield is expected to be higher than if the effects of inflation were excluded, and when the monthly change is negative, the Fund's SEC 30-day yield is expected to be lower than if the effects of inflation were excluded. Due to seasonal effects on prices, the Fund's 30-day yield (which is an annualized number) can vary substantially from one month to the next and an exceptionally high 30-day yield may be attributable to a high monthly change in the inflation rate, which might not be repeated.

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

Asset Mix (%)<sup>8</sup>

as of Mar 31, 2024



U.S. Treasuries	71.93
Floating-Rate Loans	19.73
Other Investments	3.20
Commercial Mortgage Backed Securities	3.05
Cash	1.04
Asset Backed Securities	1.00
Bond ETF	0.05
Total	100.00

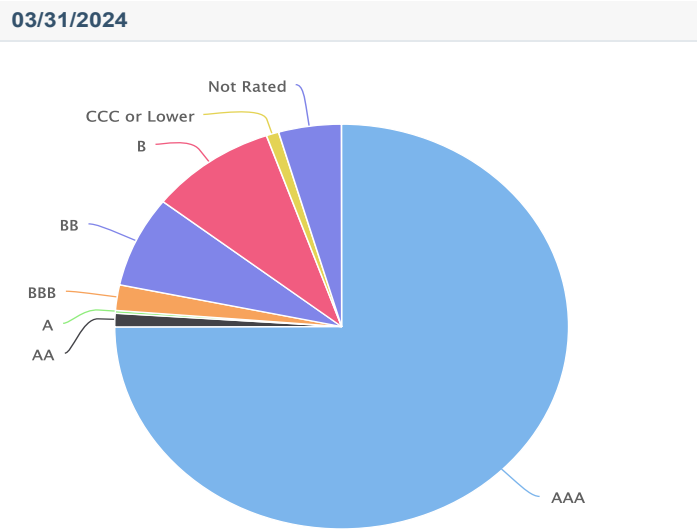
Portfolio Statistics

as of Mar 31, 2024

Number of Issuers	415
Average Coupon	2.65%
Effective Duration	2.17 yrs.
Average Price	\$97.09

Credit Quality (%)<sup>9</sup>

as of Mar 31, 2024



AAA	74.98
AA	1.08
A	0.22
BBB	2.03
BB	7.28
B	9.04
CCC or Lower	0.89
Not Rated	4.48
Total	100.00

Ratings are based on Moody's, S&P or Fitch, or Kroll for securitized debt instruments only (such as asset-backed securities and mortgage-backed securities), as applicable. If securities are rated differently by the ratings agencies, the highest rating is applied. 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 an issuance 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, Fitch or Kroll (Baa or higher by Moody's) 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 the national ratings agencies stated above.

## Duration Breakdown (%)<sup>10,11</sup>

as of Mar 31, 2024

0 Days - 90 Days	20.66
90 Days - 180 Days	1.72
180 Days - 1 Year	6.19
1 Year - 2 Years	36.22
2 Years - 3 Years	31.42
3 Years - 4 Years	2.71
4 Years - 5 Years	0.71
Over 5 years	0.05
Total	99.68

## Fund Holdings<sup>12,13</sup>

as of Mar 31, 2024

Holding	Coupon Rate	Maturity Date	% of Net Assets
United States Treasury Inflation Indexed Bonds	0.38%	07/15/2027	5.67%
United States Treasury Inflation Indexed Bonds	0.13%	07/15/2026	5.57%
United States Treasury Inflation Indexed Bonds	0.63%	01/15/2026	5.44%
United States Treasury Inflation Indexed Bonds	1.63%	10/15/2027	5.30%
United States Treasury Inflation Indexed Bonds	0.13%	10/15/2026	5.09%
United States Treasury Inflation Indexed Bonds	0.38%	01/15/2027	5.00%
United States Treasury Inflation Indexed Bonds	0.38%	07/15/2025	4.70%
United States Treasury Inflation Indexed Bonds	0.13%	04/15/2027	4.65%
United States Treasury Inflation Indexed Bonds	0.13%	04/15/2026	4.63%
United States Treasury Inflation Indexed Bonds	0.50%	01/15/2028	4.38%

[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.

8. Percent of gross assets. Excludes all derivatives.

9. Credit quality breakdown includes fixed income and floating-rate loan investments.

10. Percent of total market value.

11. Duration is a measure of the expected life of a fixed-income security and its sensitivity to changes in interest rates. The longer a fund's average portfolio duration, the more sensitive the fund will be to changes in interest rates.

12. 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.

13. Percent of total net assets.

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## Management



**Brian S. Ellis, CFA**  
Executive Director, Portfolio Manager  
Joined Eaton Vance 2016

### Biography

Brian is an executive director of Morgan Stanley Investment Management and a portfolio manager on the Broad Markets Fixed Income team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's Broad Markets strategies, including Calvert Research and Management Multi-Sector strategies. He joined Calvert Research and Management's predecessor organization Calvert Investment Management in 2009. Eaton Vance acquired Calvert Investment Management in 2016. Morgan Stanley acquired Eaton Vance in March 2021.

Brian began his career in the investment management industry in 2006. Before joining Eaton Vance, he worked as a portfolio manager of fixed-income strategies for Calvert Investments. He was previously affiliated with Legg Mason Capital Management (now ClearBridge Investments).

Brian earned a B.S. in finance from Salisbury University. He is a CFA charterholder and an FSA credential holder. He is a member of the CFA Institute and the CFA Society Boston.

### Education

- B.S. Salisbury University

### Experience

- Managed Fund since 2019

### Other funds managed

- [Balanced Fund](#)
- [Core Bond Fund](#)
- [Total Return Bond Fund](#)



**Jason C. DesLauriers, CFA**  
Executive Director, Portfolio Manager  
Joined Eaton Vance 2009

### Biography

Jason DesLauriers is Research Analyst on the Securitized Team, focused on interest rate sensitive and U.S. agency mortgage guidance. Additionally, he is a portfolio manager and assists in the quantitative evaluation process for the inflation managed funds. He joined Eaton Vance in 2009. Morgan Stanley acquired Eaton Vance in March 2021.

Jason began his career in the investment management industry in 2007. Before joining Eaton Vance, he was a senior associate at State Street, working in mutual fund accounting and performance and analytics.

Jason earned a B.S. from Bridgewater State University. He is a United States Army veteran, serving under the 1st Infantry Division during Operation Iraqi Freedom to Tikrit, Iraq from November 2003 to March 2005. He is a CFA charterholder.

### Education

- B.S. Bridgewater State University

### Experience

- Managed Fund since 2019

## Literature

## Literature



### Fact Sheet

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





### Annual Report


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



### Full Prospectus


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


 **Q1 Holdings**  
[Download](#) - Last updated: Jan 31, 2024

 **Q3 Holdings**  
[Download](#) - Last updated: Jul 31, 2023

 **Holdings - Form N-PORT**  
[Download](#)

 **SAI**  
[Download](#) - Last updated: Mar 1, 2024

 **Semi-Annual Report**  
[Download](#) - Last updated: Apr 30, 2023

 **Summary Prospectus**  
[Download](#) - Last updated: Mar 1, 2024



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Boston, MA 02110

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Calculator](#)

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