



Calvert Balanced Fund (I)

The Fund seeks to achieve a competitive total return through an actively managed portfolio of stocks, bonds, and money market instruments, which offer income and capital growth opportunity.



Share Class

CBAIX

Symbol

\$40.22 -\$0.08

NAV as of Jan 15, 2021



Fact Sheet

Sep 30, 2020



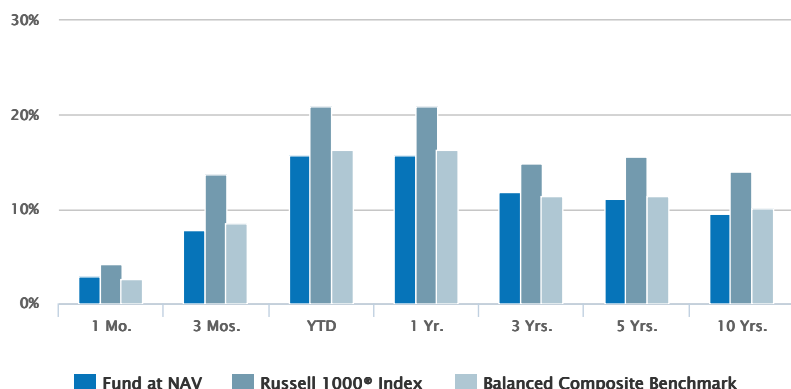
Commentary

Sep 30, 2020

Historical Returns (%)

as of Dec 31, 2020

12/31/2020



Fund at NAV	2.82	7.83	15.75	15.75	11.87	11.13	9.53
Russell 1000® Index ¹	4.23	13.69	20.96	20.96	14.80	15.58	14.00
Balanced Composite Benchmark ²	2.59	8.45	16.29	16.29	11.43	11.35	10.11

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. Performance prior to December 31, 2016 reflects the performance of the Fund's former adviser, Calvert Investment Management, Inc. The share class has no sales charge.

Fund Facts

as of Dec 31, 2020

Class I Inception	12/27/2004
Performance Inception	10/21/1982
Investment Objective	Total return
Total Net Assets	\$1.1B
Minimum Investment	\$250000
Expense Ratio (Gross) ³	0.71%
Expense Ratio (Net) ^{3,4}	0.68%
CUSIP	131618829

Top 10 Holdings (%)^{5,6}

as of Sep 30, 2020

Microsoft Corp	4.08
Apple Inc	4.04
Amazon.com Inc	3.84
Alphabet Inc - CL C	2.76
Fannie Mae or Freddie Mac	1.73
PepsiCo Inc	1.66
American Tower Corp	1.47
Danaher Corp	1.47
Home Depot Inc	1.46
Thermo Fisher Scientific Inc	1.42
Total	23.92

Morningstar Rating™

as of Dec 31, 2020

Time Period

Rating

Funds in
Allocation--50% to 70% Equity
Category

Time Period	Rating	Funds in Allocation--50% to 70% Equity Category
Overall	★★★★★	636
3 Years	★★★★★	636
5 Years	★★★★★	575
10 Years	★★★★★	414

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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Portfolio Management

[Vishal Khanduja, CFA](#)

[Managed Fund since 2013](#)

[Brian S. Ellis, CFA](#)

[Managed Fund since 2015](#)

[Charles Gaffney](#)

[Managed Fund since 2016](#)

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About Risk:

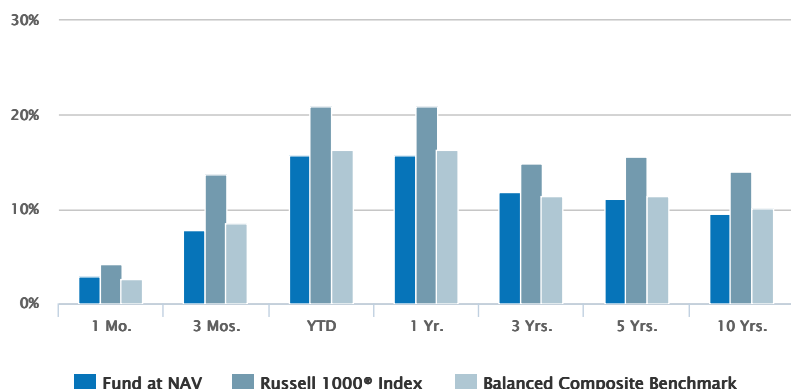
The value of investments held by the Fund may increase or decrease in response to economic, and financial events (whether real, expected or perceived) in the U.S. and global markets. The value of equity securities is sensitive to stock market volatility. As interest rates rise, the value of certain income investments is likely to decline. 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 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. 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.

1. Russell 1000® Index is an unmanaged index of 1,000 U.S. large-cap stocks. 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. The Balanced Composite Benchmark is an internally constructed benchmark which, as of 11/01/2015, is comprised of a blend of 60% Russell 1000 Index and 40% Bloomberg Barclays U.S. Aggregate Index. See the Fund's prospectus for additional information, including past benchmark composition. Rebalanced Monthly.
 3. Source: Fund prospectus.
 4. Net Expense Ratio reflects a contractual expense reimbursement that continues through 1/31/21. Without the reimbursement, if applicable, performance would have been lower.
 5. Top 10 Holdings excludes cash and equivalents.
 6. Percent of total net assets.
-

Historical Returns (%)

as of Dec 31, 2020

12/31/2020



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Calendar Year Returns (%)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Fund at NAV	3.80	11.37	17.83	10.34	-2.43	8.16	11.94	-2.47	24.05	15.75
Russell 1000® Index ¹	1.50	16.42	33.11	13.24	0.92	12.05	21.69	-4.78	31.43	20.96
Balanced Composite Benchmark ²	—	—	—	—	0.44	8.37	14.13	-2.59	22.16	16.29

Fund Facts

Expense Ratio (Gross) ³	0.71%
Expense Ratio (Net) ^{3,4}	0.68%
Class I Inception	12/27/2004
Performance Inception	10/21/1982
Distribution Frequency	Quarterly

Yield Information

as of Dec 31, 2020

Distribution Rate at NAV	1.01%
SEC 30-day Yield ⁷	0.88%

Morningstar Rating™

as of Dec 31, 2020

Time Period	Rating	Funds in Allocation--50% to 70% Equity Category
Overall	★★★★★	636
3 Years	★★★★★	636
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NAV History

Date	NAV	NAV Change
Jan 15, 2021	\$40.22	-\$0.08
Jan 14, 2021	\$40.30	-\$0.18
Jan 13, 2021	\$40.48	\$0.08
Jan 12, 2021	\$40.40	-\$0.06
Jan 11, 2021	\$40.46	-\$0.20
Jan 08, 2021	\$40.66	\$0.16
Jan 07, 2021	\$40.50	\$0.38
Jan 06, 2021	\$40.12	\$0.16
Jan 05, 2021	\$39.96	\$0.12
Jan 04, 2021	\$39.84	-\$0.41

Distribution History⁸

Ex-Date	Distribution	Reinvest NAV
Dec 29, 2020	\$0.10200	\$40.04
Sep 28, 2020	\$0.11350	\$37.84

Ex-Date	Distribution	Reinvest NAV
Jun 26, 2020	\$0.12210	\$35.17
Mar 27, 2020	\$0.11940	\$30.73
Dec 27, 2019	\$0.14540	\$35.83
Sep 26, 2019	\$0.12550	\$34.98
Jun 26, 2019	\$0.13590	\$34.05
Mar 27, 2019	\$0.12100	\$32.67
Dec 28, 2018	\$0.13720	\$29.69
Sep 26, 2018	\$0.13380	\$33.71

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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 History⁸

Ex-Date	Short-Term	Long-Term	Reinvest NAV
Dec 29, 2020	\$0.11420	\$0.47240	\$40.04
Dec 02, 2019	\$0.09870	\$0.66100	\$35.01
Nov 29, 2018	\$0.26630	\$0.82990	\$31.54

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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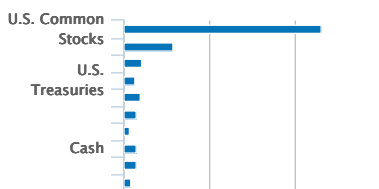
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 3. Source: Fund prospectus.
 4. Net Expense Ratio reflects a contractual expense reimbursement that continues through 1/31/21. Without the reimbursement, if applicable, performance would have been lower.
 7. SEC 30-day yield is a standardized measure 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. 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.
 8. 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 (%)⁶

as of Sep 30, 2020

09/30/2020



U.S. Common Stocks	57.71
Investment Grade Corporate Bonds	14.42
Asset Backed Securities	5.19
U.S. Treasuries	3.07
Other	4.90
Collateralized Mortgage Obligations	3.74
Foreign Common Stocks	1.78
Cash	3.39
Mortgage Backed Securities	3.67
Commercial Mortgage Backed Securities	2.13

GICS Sector Breakdown (%)⁹

as of Sep 30, 2020

09/30/2020

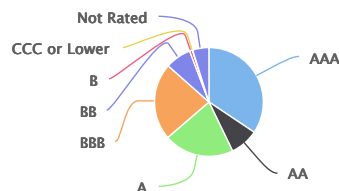


Comm. Services	9.85	10.26
Consumer Discretionary	11.82	12.27
Consumer Staples	7.01	6.47
Energy	0.75	1.92
Financials	10.70	9.61
Health Care	14.84	14.18
Industrials	8.40	8.62
Information Technology	30.02	28.03
Materials	1.09	2.68
Real Estate	2.66	3.13
Utilities	2.85	2.82

Credit Quality (%)¹⁰

as of Sep 30, 2020

09/30/2020



AAA	34.39
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Ratings are based on Moody's, S&P or Fitch, 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 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 or Fitch (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.

Assets by Country (%)⁶

as of Sep 30, 2020

United States	91.93
France	0.96
Taiwan	0.84
Canada	0.65
United Kingdom	0.46
Australia	0.39
Ireland	0.36
Mexico	0.24
Korea	0.20
Cash & Other Assets	3.39
Total	100.00

[View All](#)

AA	8.47
A	20.82
BBB	22.87
BB	7.69
B	0.84
CCC or Lower	0.09
Not Rated	4.83
Total	100.00

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Fund Holdings^{6,11}

as of Nov 30, 2020

Holding	Coupon Rate	Maturity Date	% of Net Assets
Microsoft Corp	0.80%		4.12%
Amazon.com Inc	0.00%		3.81%
Apple Inc	0.00%		3.76%
Alphabet Inc - CL C	0.00%		3.08%
CALVERT CASH RESERVES FUND CALVERT CASH RESERVES FUND	0.00%		2.93%
PepsiCo Inc	2.06%		1.65%
JPMorgan Chase & Co	1.00%		1.60%
Fannie Mae or Freddie Mac	3.00%	12/01/2049	1.57%
Fidelity National Information Services Inc	0.00%		1.48%
Danaher Corp	0.10%		1.46%

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6. Percent of total net assets.

9. Percent of equity holdings.

10. Percent of bond holdings.

11. 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.



Vishal Khanduja, CFA
Portfolio Manager

Biography

Vishal Khanduja is a vice president and portfolio manager for Calvert Research and Management, a wholly owned subsidiary of Eaton Vance Management specializing in responsible and sustainable investing across global capital markets. He joined Calvert Research and Management in 2016.

Vishal began his career in the investment management industry in 2005. He has been affiliated with the Eaton Vance organization since 2016. Before joining the Eaton Vance organization, he was a senior vice president, portfolio manager and head of taxable fixed income for Calvert Investments. Previously, he was a vice president and portfolio manager at Columbia Threadneedle and associate director of fixed-income analytics at Galliard Capital.

Vishal earned a bachelor of engineering from VJTI, Mumbai, India and an MBA from the Tippie School of Management at the University of Iowa. He is a member of the CFA Institute and the CFA Society of Boston. He is a CFA charterholder.

Education

- B.Eng., Veermata Jijabai Technological Institute, Mumbai
- M.B.A., Tippie School of Management, University of Iowa

Experience

- Managed Fund since 2013
-



Brian S. Ellis, CFA
Portfolio Manager

Biography

Brian Ellis is a vice president and portfolio manager for Calvert Research and Management, a wholly owned subsidiary of Eaton Vance Management specializing in responsible and sustainable investing across global capital markets. He joined Calvert Research and Management in 2016.

Brian began his career in the investment management industry in 2006. He has been affiliated with the Eaton Vance organization since 2016. Before joining the Eaton Vance organization, he was a portfolio manager of fixed-income strategies for Calvert Investments. Previously, he was a software engineer and analyst at 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 of Boston.

Education

- B.S., Salisbury University

Experience

- Managed Fund since 2015
-



Charles Gaffney
Portfolio Manager

Biography

Charles Gaffney is a vice president and portfolio manager for Calvert Research and Management, a wholly owned subsidiary of Eaton Vance Management specializing in responsible and sustainable investing across global capital markets. He joined Calvert Research and Management in 2016.

Charlie began his career in the investment management industry in 1996. He has been affiliated with the Eaton Vance organization since 2003. Before joining the Eaton Vance organization, he was affiliated with Brown Brothers Harriman as a sector portfolio manager and Morgan Stanley Dean Witter as a senior equity analyst.

Charlie earned a B.A. from Bowdoin College in 1995 and an MBA from Fordham University.

Education

- B.A. Bowdoin College
- M.B.A. Graduate School of Business, Fordham University

Experience

- Managed Fund since 2016
-
-

Literature



Fact Sheet

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Commentary

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Annual Report

[Download](#) - Last updated: Sep 30, 2020



Full Prospectus

[Download](#) - Last updated: Feb 1, 2020



Q1 Holdings

[Download](#) - Last updated: Dec 31, 2019



Q3 Holdings

[Download](#) - Last updated: Jun 30, 2020



Holdings - Form N-PORT

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Proxy Statement

[Download](#) - Last updated: Dec 30, 2020



SAI

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Semi-Annual Report

[Download](#) - Last updated: Mar 31, 2020



Summary Prospectus

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