



Calvert Equity Fund (C)

The Fund seeks growth of capital through investment in stocks believed to offer opportunities for potential capital appreciation.

C ▼

Share Class

CSECX

Symbol

\$34.53 \$0.14

NAV as of Oct 23, 2020



Impact Metric Fact Sheet

Sep 30, 2020



Fact Sheet

Sep 30, 2020



Commentary

Sep 30, 2020



Attribution

Sep 30, 2020



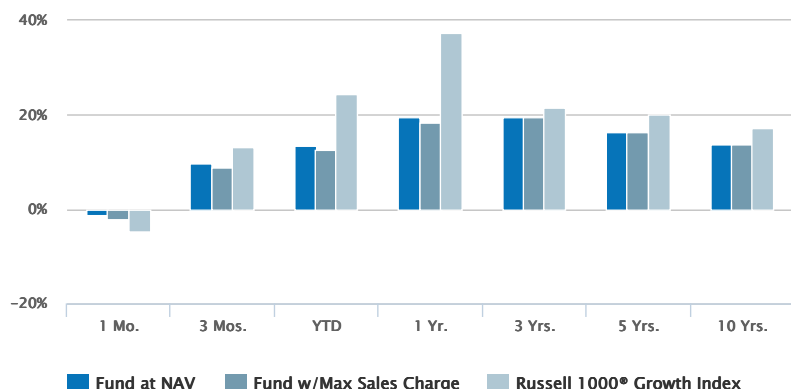
Estimated Year-End Distributions

Aug 31, 2020

Historical Returns (%)

as of Sep 30, 2020

09/30/2020



Fund at NAV	-1.21	9.80	13.55	19.38	19.62	16.31	13.80
Fund w/Max Sales Charge	-2.19	8.80	12.55	18.38	19.62	16.31	13.80
Russell 1000®Growth Index ¹	-4.70	13.22	24.33	37.53	21.65	20.08	17.24

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. Max Sales Charge: 1%.

Fund Facts

as of Sep 30, 2020

Class C Inception	03/01/1994
Performance Inception	08/24/1987
Investment Objective	Capital growth
Total Net Assets	\$5.1B
Minimum Investment	\$1000
Expense Ratio (Gross) ²	1.75%
Expense Ratio (Net) ^{2,3}	1.74%
CUSIP	131618704

Top 10 Holdings (%)^{4,5}

as of Sep 30, 2020

Thermo Fisher Scientific Inc	4.91
Danaher Corp	4.90
Alphabet Inc - CL C	4.65
Microsoft Corp	4.42
Visa Inc	4.38
Dollar General Corp	4.16
Zoetis Inc	3.78
Mastercard Inc	3.58
Ecolab Inc	3.58
American Tower Corp	3.50
Total	41.86

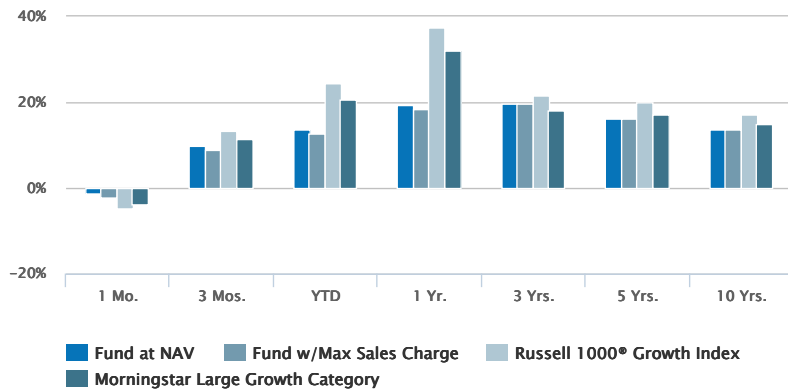
Portfolio Management

[Joseph B. Hudepohl, CFA](#)
[Managed Fund since 2015](#)
[Lance V. Garrison, CFA](#)
[Managed Fund since 2015](#)
[Jeffrey A. Miller, CFA](#)
[Managed Fund since 2015](#)

Historical Returns (%)

as of Sep 30, 2020

09/30/2020



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Russell 1000®Growth Index ¹	-4.70	13.22	24.33	37.53	21.65	20.08	17.24
Morningstar Large Growth Category ⁶	-3.66	11.54	20.64	32.13	18.22	16.99	15.01

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Calendar Year Returns (%)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Fund at NAV	16.34	-2.97	14.69	29.56	10.20	2.91	1.49	24.84	4.31	35.45
Russell 1000®Growth Index ¹	16.71	2.64	15.26	33.48	13.05	5.67	7.08	30.21	-1.51	36.39

Fund Facts

Expense Ratio (Gross) ²	1.75%
Expense Ratio (Net) ^{2,3}	1.74%
Class C Inception	03/01/1994
Performance Inception	08/24/1987
Distribution Frequency	Annually

Risk Measures (3 Year)⁷

as of Sep 30, 2020

Alpha (%)	3.37
Beta	0.74
Information Ratio	-0.28
R-Squared (%)	87.37
Standard Deviation (%)	14.99
Sharpe Ratio	1.20

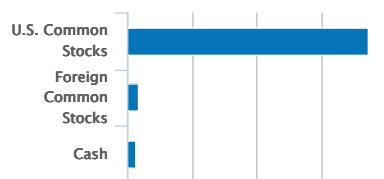
Morningstar Rating™

as of Sep 30, 2020

Asset Mix (%)⁵

as of Sep 30, 2020

09/30/2020

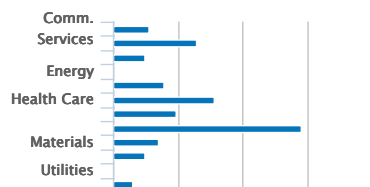


U.S. Common Stocks	92.96
Foreign Common Stocks	4.09
Cash	2.95
Total	100.00

GICS Sector Breakdown (%)⁵

as of Sep 30, 2020

09/30/2020



Comm. Services	5.43	10.86
Consumer Discretionary	12.82	16.47
Consumer Staples	4.93	4.77
Energy	—	0.07
Financials	7.85	1.97
Health Care	15.58	14.04
Industrials	9.61	4.63
Information Technology	29.07	44.52
Materials	6.89	0.83
Real Estate	4.86	1.83
Utilities	—	0.02
Cash	2.95	—

Fund Holdings (%)^{5,9}

as of Aug 31, 2020

Holding	% of Net Assets
Thermo Fisher Scientific Inc	4.85%
Alphabet Inc - Cl C	4.85%

Portfolio Statistics

as of Sep 30, 2020

Number of Holdings 43

Assets by Country (%)⁵

as of Sep 30, 2020

United States	92.96
United Kingdom	3.31
Israel	0.78
Cash & Other Assets	2.95
Total	100.00

Joseph B. Hudepohl, CFA
Managing Director and Principal
Atlanta Capital Management
Joined Atlanta Capital 2015

Biography

Joseph Hudepohl is a managing director and principal of Atlanta Capital Management Company, LLC, an investment adviser and majority-owned subsidiary of Eaton Vance Corp. He serves as a portfolio manager on the firm's growth equity team. He joined Atlanta Capital in 2015.

Joe began his career in the investment management industry in 1997. Prior to joining Atlanta Capital, he was affiliated with Logan Circle Partners LP, a division of Fortress Investment Group LLC, as a portfolio manager and with Goldman Sachs Asset Management in Tampa, Florida.

Joe earned a B.A. in economics from Stanford University. He is a former member of the U.S. National Swim Team and a three-time Olympic medalist. Joe is a CFA charterholder.

Education

- B.A. Stanford University

Experience

- Managed Fund since 2015

Other funds managed

- [Atlanta Capital Focused Growth Fund](#)

Lance V. Garrison, CFA
Vice President and Principal
Atlanta Capital Management
Joined Atlanta Capital 2007

Biography

Lance Garrison is a vice president and principal of Atlanta Capital Management Company, LLC, an investment adviser and majority-owned subsidiary of Eaton Vance Corp. He serves as a portfolio manager on the firm's growth equity team. He joined Atlanta Capital in 2007.

Lance began his career in the investment management industry in 2000. Prior to joining Atlanta Capital, he worked at Standard & Poor's Corporate Value Consulting and Wellington Management Company.

Lance earned a B.S. from the University of Florida and an MBA from Northwestern University. He is a CFA charterholder and a Chartered SRI Counselor. Lance holds the Fundamentals of Sustainability Accounting (FSA) credential and is a subject matter expert with the Sustainability Accounting Standards Board (SASB). Additionally, he serves on the SASB Standards Advisory Group advising on matters of implementation and emerging issues that should be considered in the standards development process.

Education

- B.S. University of Florida
- M.B.A. Northwestern University

Experience

- Managed Fund since 2015

Other funds managed

- [Atlanta Capital Focused Growth Fund](#)

Jeffrey A. Miller, CFA
Vice President and Principal
Atlanta Capital Management
Joined Atlanta Capital 2014

Biography

Jeffrey Miller is a vice president and principal of Atlanta Capital Management Company, LLC, an investment adviser and majority-owned subsidiary of Eaton Vance Corp. He serves as a portfolio manager on the firm's growth equity team. He joined Atlanta Capital in 2014.

Jeff began his career in the investment management industry in 1996. Prior to joining Atlanta Capital, he was affiliated with Crawford Investment Counsel as a research analyst; he was

Literature



Impact Metric Fact Sheet

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Annual Report

[Download](#) - Last updated: Sep 30, 2019



Estimated Year-End Distributions

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Full Prospectus

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



Holdings-1st or 3rd fiscal quarters-www.sec.gov

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SAI

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



Semi-Annual Report

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



Summary Prospectus

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



XBRL

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