



Calvert Ultra-Short Duration Income Fund (I)

The Fund seeks to maximize income to the extent consistent with preservation of capital, through investment in short-term bonds and income-producing securities.

Share Class

CULIX

Symbol

\$9.94 \$0.00

NAV as of Jun 21, 2021



Fact Sheet

Mar 31, 2021



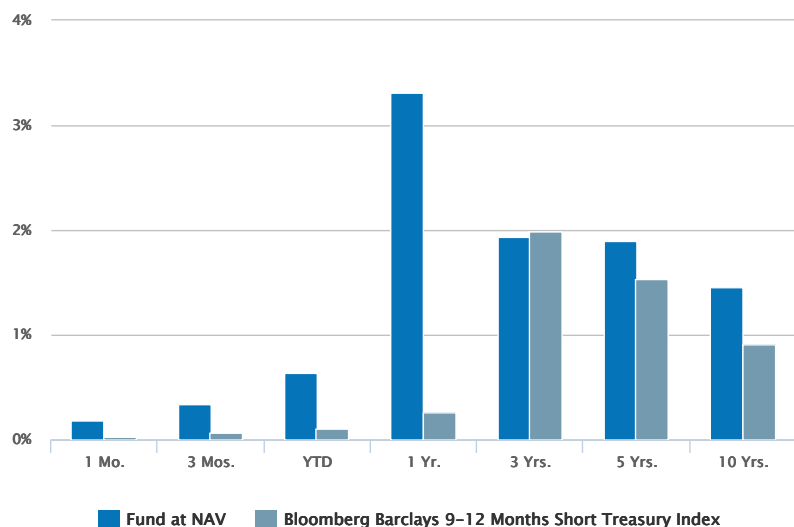
Commentary

Mar 31, 2021

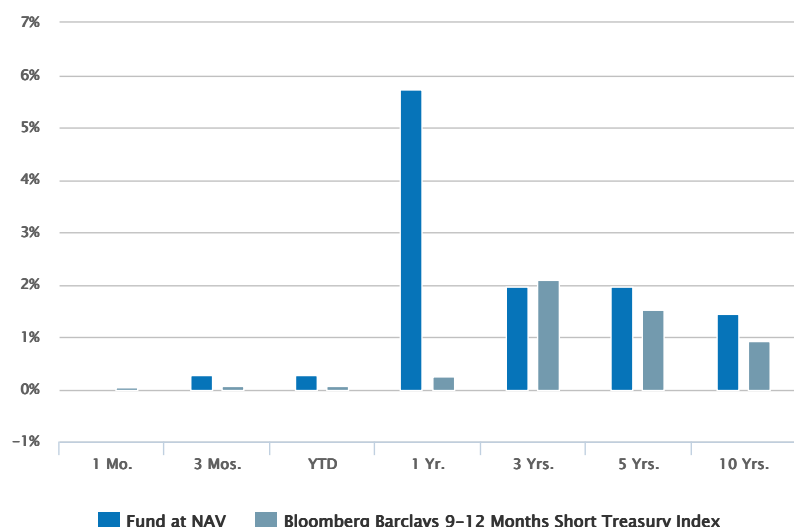
Historical Returns (%)

as of Mar 31, 2021

05/31/2021



03/31/2021



05/31/2021

| | | | | | | | |
|--|------|------|------|------|------|------|------|
| Fund at NAV | 0.18 | 0.34 | 0.64 | 3.31 | 1.93 | 1.89 | 1.45 |
| Bloomberg Barclays 9-12 Months Short Treasury Index ¹ | 0.02 | 0.06 | 0.10 | 0.26 | 1.99 | 1.53 | 0.91 |

03/31/2021

| | | | | | | | |
|--|-------|------|------|------|------|------|------|
| Fund at NAV | -0.01 | 0.28 | 0.28 | 5.72 | 1.96 | 1.96 | 1.44 |
| Bloomberg Barclays 9-12 Months Short Treasury Index ¹ | 0.03 | 0.07 | 0.07 | 0.25 | 2.08 | 1.53 | 0.92 |

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. Total return prior to the commencement of the class reflects returns of another Fund class. Prior returns are adjusted to reflect applicable sales charge (but were not adjusted for other expenses). If adjusted for other expenses, returns would be lower. The share class has no sales charge.

Fund Facts

as of May 31, 2021

| | |
|--|--|
| Class I Inception | 01/31/2014 |
| Performance Inception | 10/31/2006 |
| Investment Objective | Maximize income, to the extent consistent with preservation of capital |
| Total Net Assets | \$894.0M |
| Minimum Investment | \$250000 |
| Expense Ratio (Gross)^{2,3} | 0.51% |
| Expense Ratio (Net)^{2,3} | 0.47% |
| CUSIP | 131582348 |

Top 10 Holdings (%)⁴

as of Mar 31, 2021

| | |
|--|--------------|
| JPMorgan Chase & Co | 2.72 |
| United States Treasury Note/Bond | 2.06 |
| Hewlett Packard Enterprise Co | 1.81 |
| Bank of America Corp | 1.54 |
| Verizon Owner Trust 2020-A | 1.50 |
| United States Treasury Note/Bond | 1.44 |
| United States Treasury Note/Bond | 1.43 |
| Centene Corp | 1.42 |
| Canadian Imperial Bank of Commerce | 1.38 |
| AerCap Ireland Capital DAC / AerCap Global Aviation Trust | 1.31 |
| Total | 16.60 |

Portfolio Management

[Vishal Khanduja, CFA](#)

[Managed Fund since 2012](#)

[Brian S. Ellis, CFA](#)

[Managed Fund since 2015](#)

Portfolio profile subject to change due to active management. Percentages may not total 100% due to rounding.

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. 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. Mortgage- and asset-backed securities are subject to credit, interest rate, prepayment and extension risk. U.S. Treasury securities generally have a lower return than other obligations because of their higher credit quality and market liquidity. While certain U.S. Government-sponsored agencies may be chartered or sponsored by acts of Congress, their securities are neither issued nor guaranteed by the U.S. Treasury. Investments rated below investment grade (sometimes referred to as "junk") are typically subject to greater price volatility and illiquidity than higher rated investments. 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. Bloomberg Barclays 9-12 Months Short Treasury Index measures the performance of U.S. Treasury bills, notes, and bonds with a maturity between nine and twelve months. 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.

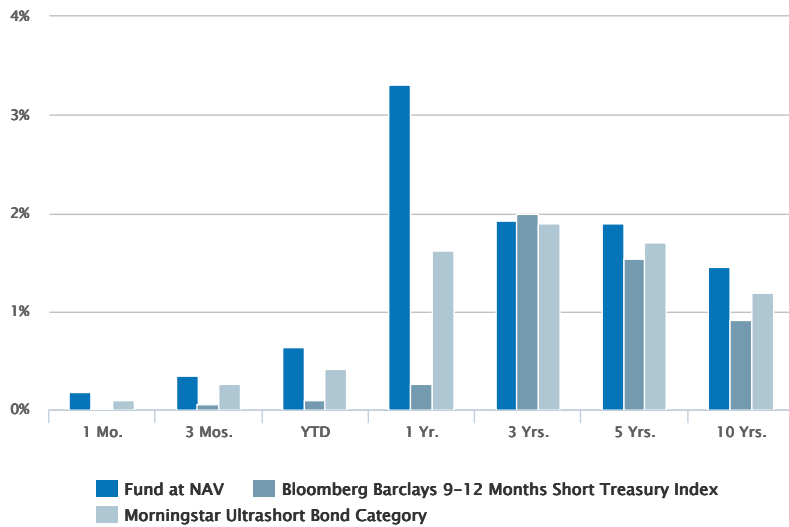
3. Net Expense Ratio reflects a contractual expense reimbursement that continues through 1/31/22. Without the reimbursement, if applicable, performance would have been lower.

4. Percent of total net assets. Top 10 holdings exclude liquid cash vehicles but include individual cash equivalent holdings.

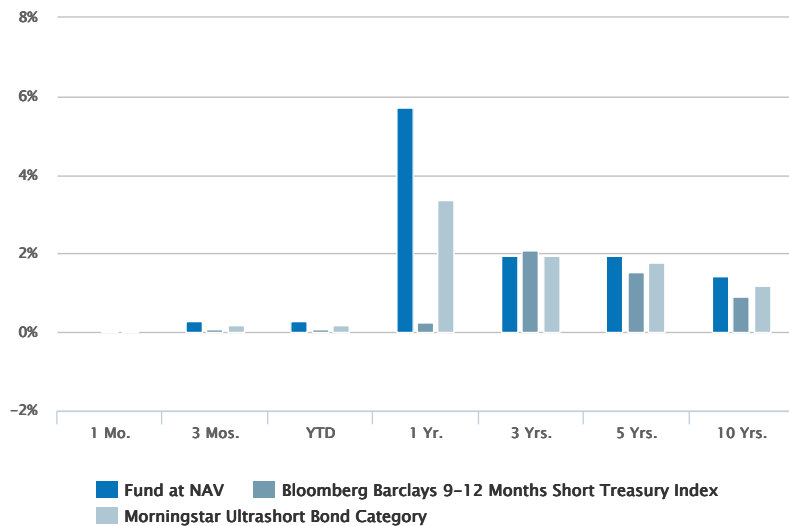
Historical Returns (%)

as of Mar 31, 2021

05/31/2021



03/31/2021



05/31/2021

| | | | | | | | |
|--|------|------|------|------|------|------|------|
| Fund at NAV | 0.18 | 0.34 | 0.64 | 3.31 | 1.93 | 1.89 | 1.45 |
| Bloomberg Barclays 9-12 Months Short Treasury Index ¹ | 0.02 | 0.06 | 0.10 | 0.26 | 1.99 | 1.53 | 0.91 |
| Morningstar Ultrashort Bond Category ⁵ | 0.10 | 0.26 | 0.41 | 1.62 | 1.89 | 1.70 | 1.19 |

03/31/2021

| | | | | | | | |
|--|-------|------|------|------|------|------|------|
| Fund at NAV | -0.01 | 0.28 | 0.28 | 5.72 | 1.96 | 1.96 | 1.44 |
| Bloomberg Barclays 9-12 Months Short Treasury Index ¹ | 0.03 | 0.07 | 0.07 | 0.25 | 2.08 | 1.53 | 0.92 |

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Calendar Year Returns (%)

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|------|------|------|------|------|------|------|------|------|------|
| Fund at NAV | 0.20 | 2.46 | 0.90 | 0.75 | 0.62 | 2.22 | 1.76 | 1.41 | 3.56 | 0.90 |
| Bloomberg Barclays 9-12 Months Short Treasury Index¹ | 0.51 | 0.23 | 0.25 | 0.17 | 0.20 | 0.79 | 0.68 | 1.90 | 2.88 | 1.69 |

Fund Facts

| | |
|--|------------|
| Expense Ratio (Gross)^{2,3} | 0.51% |
| Expense Ratio (Net)^{2,3} | 0.47% |
| Class I Inception | 01/31/2014 |
| Performance Inception | 10/31/2006 |
| Distribution Frequency | Monthly |

Yield Information

as of May 31, 2021

| | |
|--|-------|
| Distribution Rate at NAV | 0.90% |
| Subsidized SEC 30-day Yield⁶ | 0.67% |
| Unsubsidized SEC 30-day Yield | 0.64% |

Morningstar Rating™

as of May 31, 2021

| Time Period | Rating | Funds in Ultrashort Bond Category |
|-----------------|--------|-----------------------------------|
| Overall | ★★★★ | 203 |
| 3 Years | ★★★★ | 203 |
| 5 Years | ★★★★ | 160 |
| 10 Years | ★★★★☆ | 79 |

| Time Period | Rating | Funds in Ultrashort Bond Category |
|-------------|--------|---|
|-------------|--------|---|

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 History⁷

| Date | NAV | NAV Change |
|--------------|--------|------------|
| Jun 21, 2021 | \$9.94 | \$0.00 |
| Jun 18, 2021 | \$9.94 | \$0.00 |
| Jun 17, 2021 | \$9.94 | \$0.00 |
| Jun 16, 2021 | \$9.94 | -\$0.01 |
| Jun 15, 2021 | \$9.95 | \$0.01 |
| Jun 14, 2021 | \$9.94 | -\$0.01 |
| Jun 11, 2021 | \$9.95 | \$0.00 |
| Jun 10, 2021 | \$9.95 | \$0.00 |
| Jun 09, 2021 | \$9.95 | \$0.00 |
| Jun 08, 2021 | \$9.95 | \$0.00 |

Distribution History^{8,9}

| Ex-Date | Distribution | Reinvest NAV |
|--------------|--------------|--------------|
| May 28, 2021 | \$0.00759 | \$9.95 |
| Apr 30, 2021 | \$0.00793 | \$9.94 |
| Mar 31, 2021 | \$0.00861 | \$9.93 |
| Feb 26, 2021 | \$0.00927 | \$9.94 |
| Jan 29, 2021 | \$0.00963 | \$9.94 |

[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](#)

| Ex-Date | Distribution | Reinvest NAV |
|--------------|--------------|--------------|
| Dec 31, 2020 | \$0.00990 | \$9.93 |
| Nov 30, 2020 | \$0.00966 | \$9.91 |
| Oct 30, 2020 | \$0.00922 | \$9.87 |
| Sep 30, 2020 | \$0.00940 | \$9.86 |
| Aug 31, 2020 | \$0.00895 | \$9.86 |

[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^{8,9}

| Ex-Date | Short-Term | Long-Term | Reinvest NAV |
|---------|------------|-----------|--------------|
|---------|------------|-----------|--------------|

No records in this table indicates that there has not been a capital gain greater than .0001 within the past 3 years.

[Fund prospectus](#)

Portfolio profile subject to change due to active management. Percentages may not total 100% due to rounding.

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. 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. Mortgage- and asset-backed securities are subject to credit, interest rate, prepayment and extension risk. U.S. Treasury securities generally have a lower return than other obligations because of their higher credit quality and market liquidity. While certain U.S. Government-sponsored agencies may be chartered or sponsored by acts of Congress, their securities are neither issued nor guaranteed by the U.S. Treasury. Investments rated below investment grade (sometimes referred to as "junk") are typically subject to greater price volatility and illiquidity than higher rated investments. 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.

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2. Source: Fund prospectus.

3. Net Expense Ratio reflects a contractual expense reimbursement that continues through 1/31/22. Without the reimbursement, if applicable, performance would have been lower.

5. The Morningstar Ultrashort Bond Category includes funds that invest primarily in investment-grade U.S. fixed income and have durations typically less than one year.

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 share split occurred on June 15, 2018.

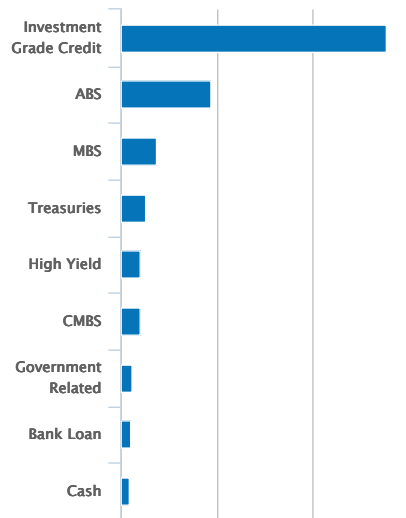
8. A portion of the Fund's returns may be comprised of return of capital or short term capital gains. The Fund will determine the tax characteristics of all Fund distributions after the end of the calendar year and will provide shareholders such information at that time. Please consult your tax advisor for further information.

9. Distribution amounts noted for periods prior to June 15, 2018 have been restated to reflect the proportional effect of a share split that occurred at the close of business on June 15, 2018.

Asset Mix (%)¹⁰

as of Mar 31, 2021

03/31/2021



| | |
|-------------------------|-------|
| Investment Grade Credit | 55.10 |
| ABS | 18.65 |
| MBS | 7.28 |
| Treasuries | 5.15 |
| High Yield | 4.08 |
| CMBS | 3.86 |
| Government Related | 2.38 |
| Bank Loan | 1.84 |
| Cash | 1.65 |

Credit Quality (%)¹¹

as of Mar 31, 2021

03/31/2021

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.

Portfolio Statistics

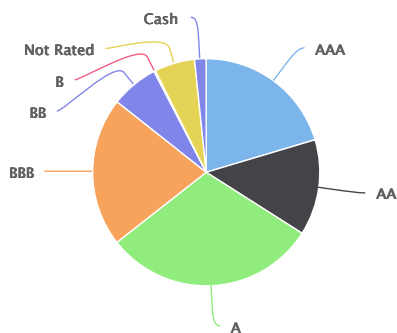
as of Mar 31, 2021

| | |
|----------------------------|-----------|
| Number of Holdings | 213 |
| Effective Duration | 0.49 yrs. |
| Average Effective Maturity | 1.51 yrs. |

Duration Breakdown (%)^{12,13}

as of Mar 31, 2021

| | |
|--------------------|--------------|
| 0 Days - 90 Days | 63.26 |
| 90 Days - 180 Days | 8.56 |
| 180 Days - 1 Year | 14.86 |
| 1 Year - 2 Years | 8.78 |
| 2 Years - 3 Years | 7.06 |
| 3 Years - 4 Years | 0.57 |
| 4 Years - 5 Years | 2.46 |
| Over 5 years | -0.41 |
| Total | 99.88 |



| | |
|------------------|-------|
| AAA | 20.39 |
| AA | 13.63 |
| A | 30.41 |
| BBB | 21.22 |
| BB | 6.76 |
| B | 0.21 |
| Not Rated | 5.73 |
| Cash | 1.65 |

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Bond Composition (%)¹¹

as of Mar 31, 2021

| | |
|--------------|-------|
| FLOAT | 50.75 |
| FIXED | 49.25 |

Assets by Country (%)¹²

as of Mar 31, 2021

| | |
|-----------------------|-------|
| United States | 80.34 |
| Canada | 7.47 |
| United Kingdom | 3.51 |
| Ireland | 1.84 |
| Bermuda | 1.74 |
| Germany | 1.36 |
| Other | 3.75 |

Fund Holdings^{10,14}

as of Apr 30, 2021

| Holding | Coupon Rate | Maturity Date | % of Net Assets |
|------------------------------------|-------------|---------------|-----------------|
| CALVERT CASH RESERVES FUND | 0.00% | | 4.81% |
| JPMorgan Chase & Co | 0.59% | 03/16/2024 | 2.79% |
| United States Treasury Note/Bond | 1.63% | 12/31/2021 | 2.11% |
| Hewlett Packard Enterprise Co | 0.91% | 10/05/2021 | 1.85% |
| Bank of America Corp | 0.74% | 10/24/2024 | 1.58% |
| Verizon Owner Trust 2020-A | 0.39% | 07/22/2024 | 1.54% |
| United States Treasury Note/Bond | 1.13% | 02/28/2022 | 1.47% |
| United States Treasury Note/Bond | 0.38% | 03/31/2022 | 1.47% |
| Centene Corp | 5.38% | 06/01/2026 | 1.45% |
| Canadian Imperial Bank of Commerce | 0.81% | 03/17/2023 | 1.41% |

[View All](#)

Portfolio profile subject to change due to active management. Percentages may not total 100% due to rounding.

About Risk:

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10. Percent of total net assets.

11. Percent of bond holdings.

12. Percent of total market value.

13. 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.

14. 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 2012
-



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
-

Literature



Fact Sheet

[Download](#) - Last updated: Mar 31, 2021



Commentary

[Download](#) - Last updated: Mar 31, 2021



Annual Report

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



Full Prospectus

[Download](#) - Last updated: Feb 1, 2021



Q1 Holdings

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



Q3 Holdings

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



Holdings - Form N-PORT

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Results of Joint Special Meeting of Shareholders of Calvert Funds

[Download](#) - Last updated: Feb 23, 2021



Joint Special Meeting of Shareholders of Calvert Funds on February 19, 2021 Will Be A Virtual Meeting

[Download](#) - Last updated: Feb 8, 2021



SAI

[Download](#) - Last updated: Feb 1, 2021



Semi-Annual Report

[Download](#) - Last updated: Mar 31, 2021



RATIOS FOR JUNE 15, 2018 SHARE SPLIT

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Summary Prospectus

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Publication details: Tuesday, June 22, 2021 9:38 AM

Page ID: CULIX - <https://funds.eatonvance.com/calvert-ultra-short-duration-income-fund-culix.php>