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Calvert Balanced Strategy



Strategy Profile

(as of Mar 31, 2021)

Investment Overview

Balanced strategy that combines Calvert's ESG research with Eaton Vance's expertise in bottom-up, fundamental equity and fixed income research. Strategy employs a straightforward, strategic allocation approach, generally consisting of 60% equities and 40% fixed income.

- Strategy is supported by three deep and cohesive teams that leverage the expertise and resources from their respective departments
 - The Calvert Principles for Responsible Investment guide the investment process, which seeks to identify and evaluate financially material ESG opportunities and risks
 - The equity portfolio focuses on quality companies identified through a combination of independent ESG analysis and differentiated fundamental research
 - The fixed income portfolio seeks consistent risk-adjusted returns through a combination of sector allocation, security selection, duration and yield curve positioning
 - ESG research also informs engagement efforts on financially material issues
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Portfolio Construction

- Long-term, strategic asset allocation target of 60% equities and 40% fixed income. Equity and fixed income exposures may deviate by up to 5% from the strategic allocation.
 - The equity portfolio seeks to prioritize bottom-up, fundamental analysis and maintains diversification across sectors, industries and types of businesses. Stock selection is intended to be the primary driver of alpha over time.
 - The fixed income portfolio leverages inputs from portfolio managers, credit analysts, ESG analysts and traders to assess risk and reward opportunities across market sectors.
 - All current and potential portfolio holdings are fully vetted from both a fundamental and ESG perspective.
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Investment Team



Vishal Khanduja, CFA Vice President
Calvert Research and Management

8 years at Calvert*
Joined Calvert Research
and Management 2016

Managed Fund since 2013



Brian S. Ellis, CFA Vice President
Calvert Research and Management

11 years at Calvert*
Joined Calvert Research
and Management 2016

Managed Fund since 2015



Charles Gaffney, Vice President
Calvert Research and Management

Joined Calvert Research
and Management 2016
Managed Fund since 2016

Benchmark

- Primary Benchmark - Russell 1000 Index
- Secondary Benchmark - Balanced Composite Benchmark

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.

Disclosure

Calvert Research and Management is an SEC registered investment adviser and wholly owned subsidiary of Eaton Vance

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