

[Home](#) / [Investment Capabilities](#) / [Fixed-Income](#) / Calvert Bond Strategy

# Calvert Bond Strategy



Quarterly Strategy Profile  
(as of Dec 31, 2023)

## Investment Overview

- ESG-integrated strategy focused on investment grade debt securities.
  - Invests solely in the securities meeting the Calvert Principles for Responsible Investment, which seek to identify companies that operate in a manner consistent with:
    - Environmental sustainability and resource efficiency
    - Equitable societies and respect for human rights
    - Accountable governance and transparent operations
  - Leverages expertise of specialized teams for fundamental credit research, risk management and trading
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## Portfolio Construction

- Integrated proprietary ESG research with fundamental credit analysis to help manage downside risk
  - Active duration and yield curve management
  - Multisector investment approach
  - Active sector rotation
  - Average Duration: +/- 0.75 year
  - Risk management focus
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## Investment Team



Vishal Khanduja, CFA  
Managing Director, Co-Head Broad  
Markets Fixed Income

Joined investment  
management industry in  
2005  
Joined Calvert\* in 2012

BE, VJTI, Mumbai, India  
MBA, University of Iowa



Brian Ellis, CFA  
Executive Director, Portfolio  
Manager

Joined investment  
management industry in  
2006  
Joined Calvert\* in 2009

BS, Salisbury University



*\*Years at Calvert include years at  
Calvert Research and Management  
(CRM) and years at Calvert  
Investment Managements (CIM).*

## Benchmark

- Bloomberg U.S. Aggregate Index
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## Disclosure

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