


# Calvert Global Energy Solutions Fund (I)


The Fund seeks to track the performance of the Calvert Global Energy Research Index.

Share Class

**CAEIX**  
Symbol

**\$7.25** \$0.01  
NAV as of Apr 18, 2019

 **Fact Sheet**  
Mar 31, 2019

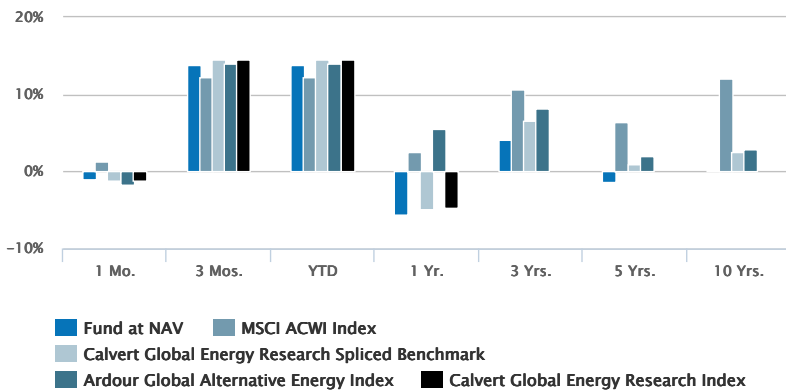
 **Commentary**  
Dec 31, 2018

## Overview

### Historical Returns (%)

as of Mar 31, 2019

03/31/2019



<b>Fund at NAV</b>	-1.01	13.76	13.76	-5.56	4.17	-1.28	0.30
<b>MSCI ACWI Index<sup>1</sup></b>	1.26	12.18	12.18	2.60	10.67	6.45	11.98
<b>Calvert Global Energy Research Spliced Benchmark<sup>2</sup></b>	-1.10	14.50	14.50	-4.80	6.56	0.98	2.46
<b>Ardour Global Alternative Energy Index<sup>3</sup></b>	-1.75	14.03	14.03	5.50	8.25	1.93	2.95
<b>Calvert Global Energy Research Index<sup>4</sup></b>	-1.10	14.50	14.50	-4.78	—	—	—

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. Effective October 4, 2016, the Calvert Global Energy Solutions Fund changed its investment objective and principal investment strategies to track the Calvert Global Energy Research Index and implement the Calvert Principles for Responsible Investment. Prior to October 4, 2016, the Fund employed an active management strategy. Performance prior to October 4, 2016 reflects the Fund's performance under its former investment objective and policies. In connection with such changes, the Fund changed its secondary benchmark from Ardour Global Alternative Energy Index to Calvert Global Energy Research Index because the investment adviser believes it is a more appropriate secondary benchmark for the Fund. 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 Mar 31, 2019

<b>Class I Inception</b>	05/31/2007
<b>Investment Objective</b>	Track performance of the Calvert Global Energy Research Index
<b>Total Net Assets</b>	\$78.4M

## Top 10 Holdings (%)<sup>7,8</sup>

as of Mar 31, 2019

<b>OptoTech Corp</b>	0.94
<b>Enel SpA</b>	0.93
<b>Delta Electronics Inc</b>	0.91

<b>Minimum Investment</b>	\$250000	<b>Infineon Technologies AG</b>	0.86
<b>Expense Ratio (Gross) <sup>5</sup></b>	1.43%	<b>Umicore SA</b>	0.86
<b>Expense Ratio (Net) <sup>5,6</sup></b>	0.99%	<b>Hitachi Chemical Co Ltd</b>	0.86
<b>CUSIP</b>	13161P813	<b>Vestas Wind Systems A/S</b>	0.85
		<b>Samsung SDI Co Ltd</b>	0.84
		<b>Universal Display Corp</b>	0.84
		<b>Brookfield Renewable Partners LP</b>	0.83
		<b>Total</b>	<b>8.72</b>

## Portfolio Management

<b>Christopher Madden, CFA</b>	Managed Fund since 2016
<b>Jade Huang</b>	Managed Fund since 2016
<b>Thomas Seto</b>	Managed Fund since 2016

Percentages may not total 100% due to rounding. Portfolio characteristics exclude 3 securities in Calvert's High Impact Investments program, which represented 2.399% of the portfolio as of 03/31/2019. High Social Impact Investments are investments that, in the Adviser's opinion, offer the opportunity for significant sustainability and social impact. These investments are generally illiquid and involve high risks. See the Fund's prospectus for details and calvert.com for a complete list of Fund holdings.

## 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 Fund's performance may not match or correlate to that of its Index, either on a daily or aggregate basis due to factors such as Fund expenses, imperfect correlation, rounding of share prices, changes to the composition of the Index, regulatory policies, high portfolio turnover and the use of leverage (if any). The Fund expects to hold the common stock of each company in the index it is designed to track, regardless of market conditions or individual investment performance, which could cause the Fund to underperform funds that employ an active strategy. Because the Fund concentrates its investments in companies in the sustainable energy solutions industry, the value of Fund shares may fluctuate more than that of a more broadly diversified fund. The value of equity securities is sensitive to stock market volatility. 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. Smaller companies are generally subject to greater price fluctuations, limited liquidity, higher transaction costs and higher investment risk than larger, more established companies. 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. 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. MSCI ACWI Index is an unmanaged free-float-adjusted market-capitalization-weighted index designed to measure the equity market performance of developed and emerging markets. 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. MSCI indexes are net of foreign withholding taxes. Source: MSCI. MSCI data may not be reproduced or used for any other purpose. MSCI provides no warranties, has not prepared or approved this report, and has no liability hereunder.
2. The Calvert Global Energy Research Spliced Benchmark is comprised of the Ardour Global Alternative Energy Index prior to October 4, 2016 and Calvert Global Energy Research Index thereafter. 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.
3. Ardour Global Alternative Energy Index measures the performance of stocks engaged in the field of alternative energy including solar, bioenergy, wind, hydro, and geothermal power sources. 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.
4. The Calvert Global Energy Research Index includes stocks of companies that manage energy in a sustainable manner or are facilitating the move to a more sustainable economy. 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.
5. Source: Fund prospectus.
6. Net expense ratio reflects a contractual expense reimbursement that continues through 1/31/20. Without the reimbursement, if applicable, performance would have been lower.

7. Top 10 Holdings excludes cash and equivalents.

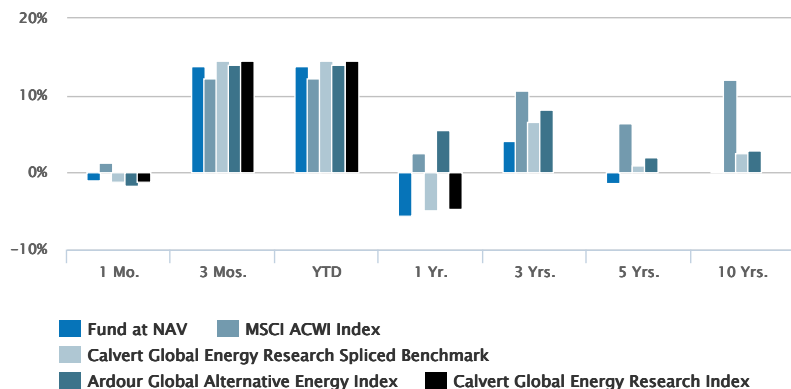
8. Percent of total net assets.

## Performance

### Historical Returns (%)

as of Mar 31, 2019

03/31/2019



Period	Fund at NAV	MSCI ACWI Index <sup>1</sup>	Calvert Global Energy Research Spliced Benchmark <sup>2</sup>	Ardour Global Alternative Energy Index <sup>3</sup>	Calvert Global Energy Research Index <sup>4</sup>
1 Mo.	-1.01	1.26	-1.10	-1.75	-1.10
3 Mos.	13.76	12.18	14.50	14.03	14.50
YTD	13.76	12.18	14.50	14.03	14.50
1 Yr.	-5.56	2.60	-4.80	5.50	-4.78
3 Yrs.	4.17	10.67	6.56	8.25	—
5 Yrs.	-1.28	6.45	0.98	1.93	—
10 Yrs.	0.30	11.98	2.46	2.95	—

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. Effective October 4, 2016, the Calvert Global Energy Solutions Fund changed its investment objective and principal investment strategies to track the Calvert Global Energy Research Index and implement the Calvert Principles for Responsible Investment. Prior to October 4, 2016, the Fund employed an active management strategy. Performance prior to October 4, 2016 reflects the Fund's performance under its former investment objective and policies. In connection with such changes, the Fund changed its secondary benchmark from Ardour Global Alternative Energy Index to Calvert Global Energy Research Index because the investment adviser believes it is a more appropriate secondary benchmark for the Fund. 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.

### Calendar Year Returns (%)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Fund at NAV	23.63	-19.70	-33.44	8.69	34.28	-10.45	-2.71	-7.24	29.64	-19.27
MSCI ACWI Index <sup>1</sup>	34.63	12.67	-7.35	16.13	22.80	4.16	-2.36	7.86	23.97	-9.42
Calvert Global Energy Research Spliced Benchmark <sup>2</sup>	23.34	-16.44	-43.64	0.66	59.43	-4.14	1.22	-1.09	30.98	-19.55
Ardour Global Alternative Energy Index <sup>3</sup>	23.34	-16.44	-43.64	0.66	59.43	-4.14	1.22	-2.89	23.51	-8.54
Calvert Global Energy Research Index <sup>4</sup>	—	—	—	—	—	—	—	—	30.98	-19.55

### Fund Facts

Expense Ratio (Gross) <sup>5</sup>	1.43%
Expense Ratio (Net) <sup>5,6</sup>	0.99%
Class I Inception	05/31/2007

### Risk Measures (3 Year)<sup>9,10</sup>

as of Mar 31, 2019

Alpha (%)	-7.54
Beta	1.20

Distribution Frequency

Annually

Information Ratio

-1.07

R-Squared (%)

81.27

Standard Deviation (%)

13.28

Sharpe Ratio

0.22

## Morningstar Rating™

as of Mar 31, 2019

Time Period	Rating	Funds in World Small/Mid Stock Category
Overall	★	121
3 Years	★	121
5 Years	★	90
10 Years	★	56

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.

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## NAV History

Date	NAV	NAV Change
Apr 17, 2019	\$7.24	\$0.02
Apr 16, 2019	\$7.22	\$0.03
Apr 15, 2019	\$7.19	\$0.02
Apr 12, 2019	\$7.17	\$0.04
Apr 11, 2019	\$7.13	-\$0.02
Apr 10, 2019	\$7.15	\$0.06
Apr 09, 2019	\$7.09	-\$0.05
Apr 08, 2019	\$7.14	\$0.02
Apr 05, 2019	\$7.12	\$0.04
Apr 04, 2019	\$7.08	\$0.01

## Distribution History

Ex-Date	Distribution	Reinvest NAV
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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](#)

Ex-Date	Distribution	Reinvest NAV
Dec 28, 2018	\$0.12080	\$6.00
Dec 28, 2017	\$0.10650	\$7.63
Dec 27, 2016	\$0.10688	\$5.97

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

Ex-Date	Short-Term	Long-Term	Reinvest NAV
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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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5. Source: Fund prospectus.

6. Net expense ratio reflects a contractual expense reimbursement that continues through 1/31/20. Without the reimbursement, if applicable, performance would have been lower.

9. Alpha measures risk-adjusted performance, showing excess return delivered at the same risk level as the benchmark. Beta measures the volatility of a fund relative to the overall market.

R-Squared represents the percentage of the portfolio's movement that can be explained by the general movement of the market. Standard deviation measures the historic volatility of a fund.

Sharpe Ratio uses standard deviation and excess return to determine reward per unit of risk.

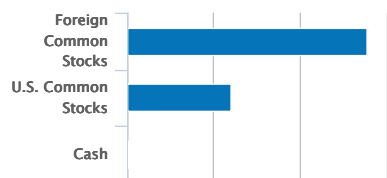
10. Information Ratio uses excess standard deviation and excess return to determine reward per unit of risk relative to the benchmark.

## Portfolio

### Asset Mix (%)<sup>8</sup>

as of Mar 31, 2019

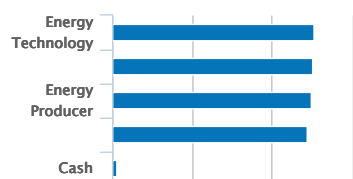
03/31/2019



Foreign Common Stocks	69.40
U.S. Common Stocks	30.05
Cash	0.54
<b>Total</b>	<b>100.00</b>

### Energy-Related Business Activity Category Weightings (%)<sup>8</sup>

03/31/2019

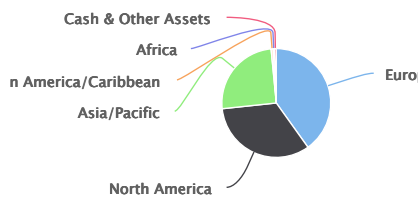


Energy Technology	25.19
Leader/Solution Providers	25.06
Energy Producer	24.91
Energy Efficiency	24.30
Cash	0.54

### Geographic Mix (%)<sup>8</sup>

as of Mar 31, 2019

03/31/2019



## Portfolio Statistics

as of Mar 31, 2019

Number of Holdings

157

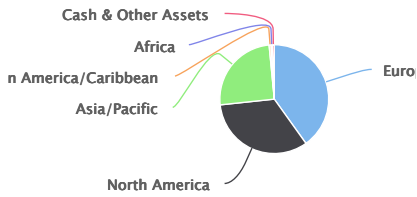
### Assets by Country (%)<sup>8</sup>

as of Mar 31, 2019

United States	30.05
Germany	8.80
Japan	7.56
Taiwan	6.70
United Kingdom	6.24
China	5.58
Spain	4.37
France	3.36
Canada	3.15
Switzerland	3.03
<b>Total</b>	<b>100.00</b>

[View All](#)

03/31/2019



Europe	40.12
North America	33.20
Asia/Pacific	25.16
Latin America/Caribbean	0.56
Africa	0.42
Cash & Other Assets	0.54
<b>Total</b>	<b>100.00</b>

## Fund Holdings (%)<sup>8,11</sup>

as of Feb 28, 2019

Holding	% of Net Assets
<b>CALVERT SOCIAL FOUNDATION NOTE</b>	2.23%
<b>Maxwell Technologies Inc</b>	1.28%
<b>Universal Display Corp</b>	1.11%
<b>Infineon Technologies AG</b>	0.95%
<b>Samsung SDI Co Ltd</b>	0.91%
<b>Delta Electronics Inc</b>	0.89%
<b>JinkoSolar Holding Co Ltd</b>	0.88%
<b>Enel SpA</b>	0.85%
<b>First Solar Inc</b>	0.84%
<b>Umicore SA</b>	0.83%
<b>View All</b>	

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8. Percent of total net assets.

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.

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# Management



**Christopher Madden, CFA**

Vice President, Calvert Research and Management  
Joined Calvert Research and Management 2016

## Biography

Christopher Madden 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 is responsible for managing the ESG-related investment research in addition to being a portfolio manager. He joined Calvert Research and Management in 2016.

Chris began his career in the investment management industry in 1999. Before joining Calvert Research and Management, he was a portfolio manager with Calvert Investments. Previously, he was an internal auditor at Vanguard Group.

Chris earned a B.S. in finance and a B.A. in economics from Indiana University of Pennsylvania. He is a member of the CFA Institute and CFA Society of Washington D.C., and is a CFA charterholder.

## Education

- B.S.B.A., Indiana University of Pennsylvania

## Experience

- Managed Fund since 2016



**Jade Huang**

Vice President, Calvert Research and Management  
Joined Calvert Research and Management 2016

## Biography

Jade Huang 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. She is responsible for managing the suite of Calvert Responsible Indices, including the index construction processes, as well as developing new investment products at Calvert. She joined Calvert Research and Management in 2016.

Jade began her career in the investment management industry in 2005. Before joining Calvert Research and Management, she was a portfolio manager with Calvert Investments. Previously, she was an investment analyst at Microvest, an asset management firm specializing in impact investing, and led the certification department at Fair Trade USA.

Jade earned a B.A. from the University of California, Berkeley and an M.A. in international finance and economics from Johns Hopkins University, School of Advanced International Studies (SAIS).

## Education

- B.A. University of California, Berkeley
- M.A. Johns Hopkins University, School of Advanced International Studies (SAIS)

## Experience

- Managed Fund since 2016



**Thomas Seto**

Vice President, Calvert Research and Management  
Joined Calvert Research and Management 2016

## Biography

Thomas Seto 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.

Tom began his career in the investment management industry in 1991. He has been affiliated with Parametric Portfolio Associates LLC, an investment adviser and majority-owned subsidiary of Eaton Vance, since 1998. Before joining Parametric, he served as the head of U.S. equity index investments at Barclays Global Investors.

Tom earned a B.S. in electrical engineering from the University of Washington and an MBA from the University of Chicago Booth School of Business.

## Education

- B.S. University of Washington
- M.B.A Booth School of Business, University of Chicago

## Experience

- Managed Fund since 2016

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## Literature

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### Literature



#### Fact Sheet

Download - Last updated: Mar 31, 2019



#### Commentary

Download - Last updated: Dec 31, 2018



#### Annual Report

Download - Last updated: Sep 30, 2018



#### Full Prospectus

Download - Last updated: Feb 1, 2019



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

Download



#### SAI

Download - Last updated: Feb 1, 2019



#### Semi-Annual Report

Download - Last updated: Mar 31, 2018



#### Summary Prospectus

Download - Last updated: Feb 1, 2019



#### XBRL

Download - Last updated: Feb 19, 2019

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*Eaton Vance Distributors, Inc. does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision.*

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