

# Calvert US Mid-Cap Core Responsible Index Fund (I)

The Fund seeks to track the performance of the Calvert US Mid-Cap Core Responsible Index, which measures the investment return of mid-capitalization stocks.

I


Share Class


**CMJIX**

Symbol

**\$25.51** \$-0.66

NAV as of Mar 22, 2019

 **Fact Sheet**  
Dec 31, 2018

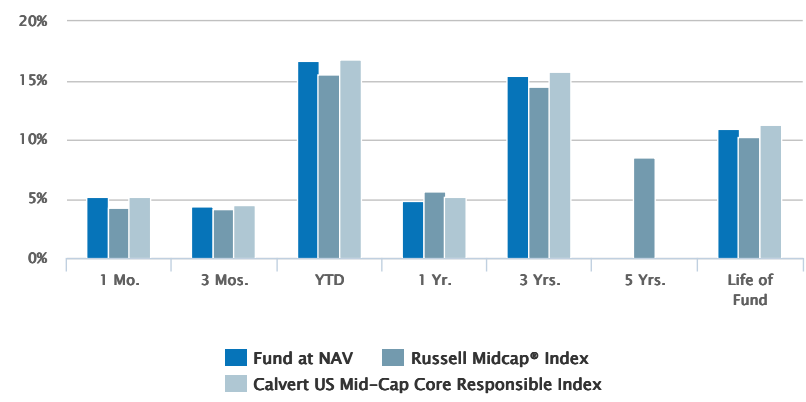
 **Attribution**  
Dec 31, 2018

## Overview

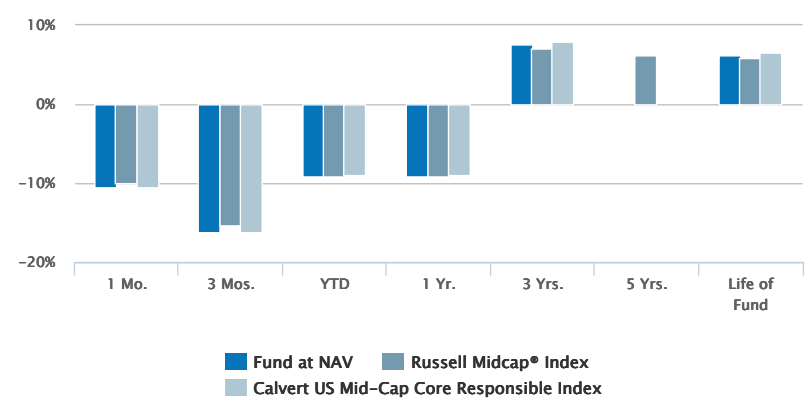
### Historical Returns (%)

as of Feb 28, 2019

02/28/2019



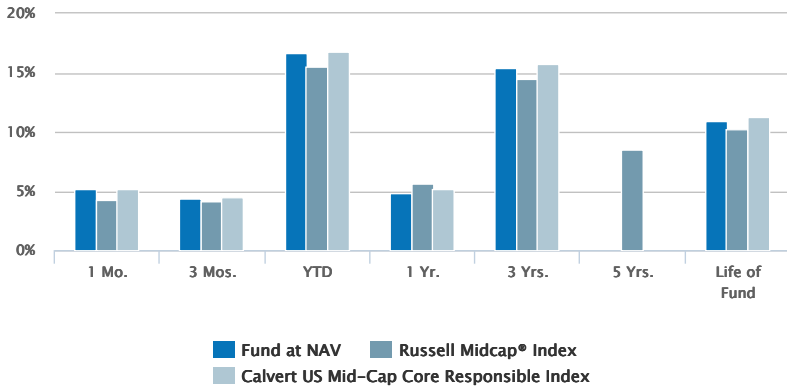
12/31/2018



02/28/2019

|  |      |      |       |      |       |      |       |
|--|------|------|-------|------|-------|------|-------|
| <b>Fund at NAV</b>                       | 5.12 | 4.41 | 16.70 | 4.84 | 15.38 | —    | 10.88 |
| <b>Russell Midcap® Index<sup>1</sup></b> | 4.30 | 4.09 | 15.55 | 5.63 | 14.46 | 8.56 | 10.21 |

*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. The share class has no sales charge.*


**Calvert US Mid-Cap Core Responsible Index<sup>2</sup>**

5.19    4.49    16.79    5.12    15.78    —    11.30

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## Fund Facts

as of Feb 28, 2019

|  |  |
|--|--|
| <b>Class I Inception</b>                 | 10/30/2015   |
| <b>Investment Objective</b>              | Track performance of the Calvert US Mid-Cap Core Responsible Index |
| <b>Total Net Assets</b>                  | \$62.1M  |
| <b>Minimum Investment</b>                | \$100000   |
| <b>Expense Ratio (Gross)<sup>3</sup></b> | 0.69%  |
| <b>Expense Ratio (Net)<sup>3,4</sup></b> | 0.24%  |
| <b>CUSIP</b>                             | 13161Y301  |

## Top 10 Holdings (%)<sup>5,6</sup>

as of Dec 31, 2018

|  |             |
|--|-------------|
| <b>Dollar General Corp</b>             | 0.58        |
| <b>Yum! Brands Inc</b>                 | 0.55        |
| <b>PPG Industries Inc</b>              | 0.52        |
| <b>O'Reilly Automotive Inc</b>         | 0.51        |
| <b>General Mills Inc</b>               | 0.50        |
| <b>Centene Corp</b>                    | 0.50        |
| <b>Worldpay Inc</b>                    | 0.49        |
| <b>United Continental Holdings Inc</b> | 0.48        |
| <b>Xcel Energy Inc</b>                 | 0.48        |
| <b>Corning Inc</b>                     | 0.47        |
| <b>Total</b>                           | <b>5.08</b> |

## Morningstar Rating™

as of Feb 28, 2019

| Time Period    | Rating | Funds in Mid-Cap Blend Category |
|----------------|--------|---------------------------------|
| <b>Overall</b> | ★★★★★  | 383                             |
| <b>3 Years</b> | ★★★★★  | 383                             |

| Time Period | Rating | Funds in Mid-Cap Blend 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.

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## Portfolio Management

|                         |                         |
|-------------------------|-------------------------|
| Thomas Seto             | Managed Fund since 2016 |
| Christopher Madden, CFA | Managed Fund since 2018 |
| Jade Huang              | Managed Fund since 2018 |

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. 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. The value of equity securities is sensitive to stock market volatility. The stocks of smaller and mid-sized companies are generally subject to higher investment risk than the stocks of 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. 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.

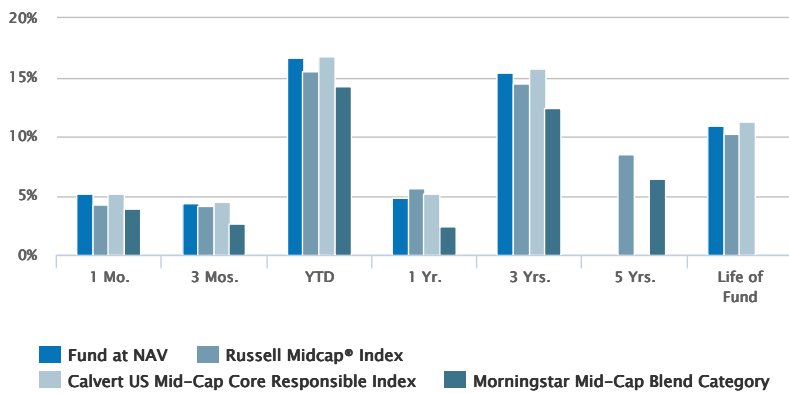
1. Russell Midcap® Index is an unmanaged index of U.S. mid-cap stocks. Unless otherwise stated, index returns do not reflect the effect of any applicable sales charges, commissions, expenses, taxes or leverage, as applicable. It is not possible to invest directly in an index. Historical performance of the index illustrates market trends and does not represent the past or future performance of the fund.
2. Calvert US Mid-Cap Core Responsible Index is a portfolio of mid capitalization U.S. stocks that meet Calvert's criteria for index inclusion based on Calvert Principles for Responsible Investment. 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. Source: Fund prospectus.
4. Net expense ratio reflects a contractual expense reimbursement that continues through 1/31/20. Without the reimbursement, if applicable, performance would have been lower.
5. Top 10 Holdings excludes cash and equivalents.
6. Percent of total net assets.

## Performance

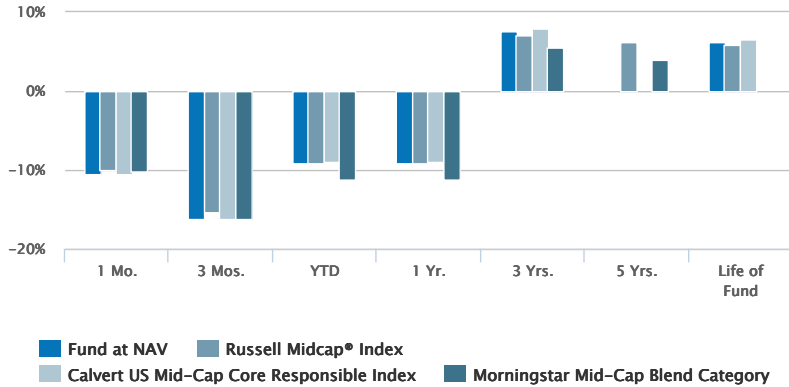
### Historical Returns (%)

as of Feb 28, 2019

02/28/2019



12/31/2018



02/28/2019

|  |      |      |       |      |       |      |       |
|--|------|------|-------|------|-------|------|-------|
| <b>Fund at NAV</b>   | 5.12 | 4.41 | 16.70 | 4.84 | 15.38 | —    | 10.88 |
| <b>Russell Midcap® Index<sup>1</sup></b>                     | 4.30 | 4.09 | 15.55 | 5.63 | 14.46 | 8.56 | 10.21 |
| <b>Calvert US Mid-Cap Core Responsible Index<sup>2</sup></b> | 5.19 | 4.49 | 16.79 | 5.12 | 15.78 | —    | 11.30 |
| <b>Morningstar Mid-Cap Blend Category<sup>7</sup></b>        | 3.95 | 2.62 | 14.21 | 2.44 | 12.44 | 6.46 | —     |

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## Calendar Year Returns (%)

|  | 2009  | 2010  | 2011  | 2012  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| <b>Fund at NAV</b>   | —     | —     | —     | —     | —     | —     | —     | 15.13 | 19.14 | -9.20 |
| <b>Russell Midcap® Index<sup>1</sup></b>                     | 40.48 | 25.48 | -1.55 | 17.28 | 34.76 | 13.22 | -2.44 | 13.80 | 18.52 | -9.06 |
| <b>Calvert US Mid-Cap Core Responsible Index<sup>2</sup></b> | —     | —     | —     | —     | —     | —     | —     | 15.72 | 19.54 | -8.89 |

## Fund Facts

|  |            |
|--|------------|
| <b>Expense Ratio (Gross)<sup>3</sup></b> | 0.69%      |
| <b>Expense Ratio (Net)<sup>3,4</sup></b> | 0.24%      |
| <b>Class I Inception</b>                 | 10/30/2015 |

## Risk Measures (3 Year)<sup>8</sup>

as of Feb 28, 2019

|                      |       |
|----------------------|-------|
| <b>Alpha (%)</b>     | 0.27  |
| <b>Beta</b>          | 1.04  |
| <b>R-Squared (%)</b> | 98.45 |

|                        |          |                        |       |
|------------------------|----------|------------------------|-------|
| Distribution Frequency | Annually | Standard Deviation (%) | 13.55 |
|                        |          | Sharpe Ratio           | 1.05  |

## Morningstar Rating™

as of Feb 28, 2019

| Time Period | Rating | Funds in Mid-Cap Blend Category |
|-------------|--------|---------------------------------|
| Overall     | ★★★★   | 383                             |
| 3 Years     | ★★★★   | 383                             |

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## NAV History

| Date         | NAV     | NAV Change |
|--------------|---------|------------|
| Mar 21, 2019 | \$26.17 | \$0.37     |
| Mar 20, 2019 | \$25.80 | -\$0.25    |
| Mar 19, 2019 | \$26.05 | -\$0.07    |
| Mar 18, 2019 | \$26.12 | \$0.14     |
| Mar 15, 2019 | \$25.98 | \$0.11     |
| Mar 14, 2019 | \$25.87 | -\$0.06    |
| Mar 13, 2019 | \$25.93 | \$0.15     |
| Mar 12, 2019 | \$25.78 | \$0.05     |
| Mar 11, 2019 | \$25.73 | \$0.36     |
| Mar 08, 2019 | \$25.37 | -\$0.06    |

## Distribution History<sup>9</sup>

| Ex-Date      | Distribution | Reinvest NAV |
|--------------|--------------|--------------|
| Nov 29, 2018 | \$0.29840    | \$24.82      |
| Dec 19, 2017 | \$0.25340    | \$25.31      |
| Dec 27, 2016 | \$0.18522    | \$22.20      |

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<sup>9</sup>

| Ex-Date      | Short-Term | Long-Term | Reinvest NAV |
|--------------|------------|-----------|--------------|
| Nov 29, 2018 | \$0.08200  | \$0.33290 | \$24.82      |
| Dec 19, 2017 | \$0.26510  | \$0.20380 | \$25.31      |
| Dec 07, 2016 | \$0.24856  |           | \$22.36      |

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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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. Source: Fund prospectus.

4. 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. The Morningstar Mid-Cap Blend Category includes funds that invest primarily in U.S. mid-cap companies where neither strong growth or value characteristics predominate.

8. 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.

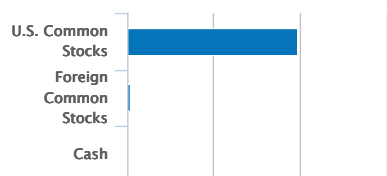
9. A portion of the Fund's returns may be comprised of return of capital or short term capital gains. The Fund will determine the tax characteristics of all Fund distributions after the end of the calendar year and will provide shareholders such information at that time. Please consult your tax advisor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

## Portfolio

### Asset Mix (%)<sup>6</sup>

as of Dec 31, 2018

12/31/2018

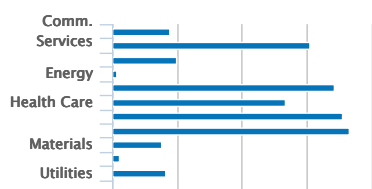


|                       |               |
|-----------------------|---------------|
| U.S. Common Stocks    | 98.73         |
| Foreign Common Stocks | 1.27          |
| Cash                  | -0.00         |
| <b>Total</b>          | <b>100.00</b> |

### GICS Sector Breakdown (%)<sup>6</sup>

as of Dec 31, 2018

12/31/2018



|                        |       |       |
|------------------------|-------|-------|
| Comm. Services         | 4.43  | 3.57  |
| Consumer Discretionary | 15.29 | 11.92 |
| Consumer Staples       | 4.91  | 4.43  |
| Energy                 | 0.30  | 4.00  |
| Financials             | 17.21 | 13.04 |
| Health Care            | 13.32 | 10.04 |
| Industrials            | 17.84 | 13.58 |
| Information Technology | 18.30 | 17.95 |
| Materials              | 3.82  | 5.12  |
| Real Estate            | 0.49  | 9.31  |

## Portfolio Statistics

as of Dec 31, 2018

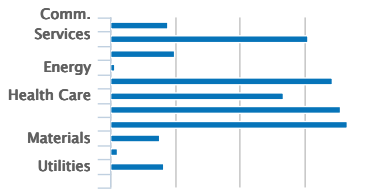
Number of Holdings 600

### Assets by Country (%)<sup>6</sup>

as of Dec 31, 2018

|                     |               |
|---------------------|---------------|
| United States       | 98.73         |
| United Kingdom      | 0.54          |
| China               | 0.27          |
| Sweden              | 0.21          |
| Bermuda             | 0.14          |
| Puerto Rico         | 0.11          |
| Cash & Other Assets | -0.00         |
| <b>Total</b>        | <b>100.00</b> |

12/31/2018



|           |       |      |
|-----------|-------|------|
| Utilities | 4.11  | 7.04 |
| Cash      | -0.00 | —    |

## Fund Holdings (%)<sup>6,10</sup>

as of Jan 31, 2019

| Holding                     | % of Net Assets |
|-----------------------------|-----------------|
| Dollar General Corp         | 0.51%           |
| Alexion Pharmaceuticals Inc | 0.49%           |
| General Mills Inc           | 0.48%           |
| Yum! Brands Inc             | 0.47%           |
| Xilinx Inc                  | 0.46%           |
| Centene Corp                | 0.46%           |
| PPG Industries Inc          | 0.44%           |
| O'Reilly Automotive Inc     | 0.43%           |
| Corning Inc                 | 0.43%           |
| Worldpay Inc                | 0.43%           |
| <a href="#">View All</a>    |                 |

Percentages may not total 100% due to rounding.

## About Risk:

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6. Percent of total net assets.

10. 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.





# Management



**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



**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 2018



**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 2018

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## Literature

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### Literature

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#### Fact Sheet

Download - Last updated: Dec 31, 2018



#### Attribution

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 20, 2019

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