

Uncovering What You're Invested In

PREPARATION

- Do you have a brokerage account?
 - If so, find your login information for the online platform
 - If you don't know, you probably don't
- Do you have an individual retirement account?
 - If so, find your login information for the online platform
 - The platform may be part of your online benefits center
 - If you can't find it, ask your human resources or benefits officer
- Do you have a pension?
 - See resources under "Institutional Divestment"

STEP 1: Login to your account on the online platform

- Take note of what company manages your platform (i.e. what website are you logging into?)
 - If your platform is managed by one of the divestment targets, consider switching platforms
 - If you are logging into an account provided by your employer, contact your employer's human resources or benefits office and ask them to consider changing platforms; depending on the size of your company, this may not actually be a major ask

STEP 2: Navigate to a page on which you can see the stocks and mutual funds you are invested; there will likely be percentages next to their names

- The page may be labeled: "Your Investments," "Change Investments," "Manage Investments," "Reallocate Investments", or something else; this will vary across platforms
- If you are invested in stocks, you can begin to screen them now
- If you are invested in mutual funds, move on to step 3

STEP 3: Go to <https://www.sec.gov/edgar/searchedgar/mutualsearch.htm>, search each of your funds, and click on the series number to its left

- If the fund does not come up, try searching for the fund name on <https://www.morningstar.com> or even google to find the ticker, a 5-letter unique code; you can then search for the SEC filings using the ticker

- Note: Some funds will have joint filings with similar funds from the same investment manager

Ex. SEARCHING BY NAME: CALVERT EQUITY A

The screenshot shows the SEC EDGAR search results for the name 'CALVERT EQUITY A'. The search results table lists several funds, with 'CALVERT SOCIAL INVESTMENT FUND' highlighted. A yellow box is drawn around the 'CALVERT SOCIAL INVESTMENT FUND' entry, and a yellow arrow points to it with the text 'Click here'.

Ex. SEARCHING BY TICKER: CSIEX

The screenshot shows the SEC EDGAR search results for the ticker 'CSIEX'. The search results table lists several funds, with 'CALVERT SOCIAL INVESTMENT FUND' highlighted. A yellow box is drawn around the 'CALVERT SOCIAL INVESTMENT FUND' entry, and a yellow arrow points to it with the text 'Click here'.

STEP 4: On the next page, scroll until you find the most recent filing labeled "N-CSR" or "N-Q" in the "Filings" column on the left and click on the button labeled "documents" directly to the right of it

The screenshot shows the SEC EDGAR search results for the company 'CALVERT SOCIAL INVESTMENT FUND'. The search results table lists several filings, with 'N-CSR' highlighted. A yellow box is drawn around the 'N-CSR' entry, and a yellow arrow points to it with the text 'Click here'.

STEP 5: On the next page, find "N-CSR" or "N-Q" in the "Type" column and click on corresponding red link directly to the right of it

The screenshot shows the SEC EDGAR filing details for the 'N-CSR' filing. The filing details table lists several documents, with 'N-CSR' highlighted. A yellow box is drawn around the 'N-CSR' entry, and a yellow arrow points to it with the text 'Click here'.

STEP 6: On the next page, hit ctrl+f to bring up the search box and enter the name of your fund; continue through the results until you see the fund's list of investments

- You begin to screen your stocks now
 - Because of the number of stocks in many mutual funds, it may be easiest to search for particular companies using ctrl+f
- Remember that there will likely be more than one fund in the document, so make sure that you are looking at the investments for the fund you are interested in
- Note: If under investments you find the names of additional funds, you are invested in what is called a "fund of funds." You will need to look up the investments of each fund in your fund of funds individually by starting back at step 3 for each.

U.S. Ultra 10-Year Treasury Note

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calvert equity 8/20

(\$33,763,438) (\$479,225)

RESTRICTED SECURITIES

	ACQUISITION DATES	COST (\$)
Alliance Mortgage Investments, Term Loan, 0.00%, 6/1/10	5/26/05-6/13/07	481,681
Calvert Impact Capital, Inc., Community Investment Notes, 1.50%, 12/15/19	12/15/16	5,081,392
ImpactAssets Inc., Global Sustainable Agriculture Notes, 2.25%, 11/9/20	11/13/15	490,000
ImpactAssets Inc., Microfinance Plus Notes, 2.88%, 11/3/20	11/13/15	631,000

See notes to financial statements.

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**CALVERT EQUITY FUND
SCHEDULE OF INVESTMENTS
MARCH 31, 2018 (Unaudited)**

	SHARES	VALUE (\$)
COMMON STOCKS - 95.5%		
Beverages - 2.7%		
Coca-Cola Co. (The)	675,166	29,322,460
PepsiCo, Inc.	303,649	33,143,288
		62,465,748
Capital Markets - 3.6%		
Charles Schwab Corp. (The)	466,283	24,365,068
Intercontinental Exchange, Inc.	810,219	58,757,082
		83,122,150
Chemicals - 5.9%		
Ecolab, Inc.	324,876	71,944,733
Praxair, Inc.	443,373	64,296,473
		136,241,206