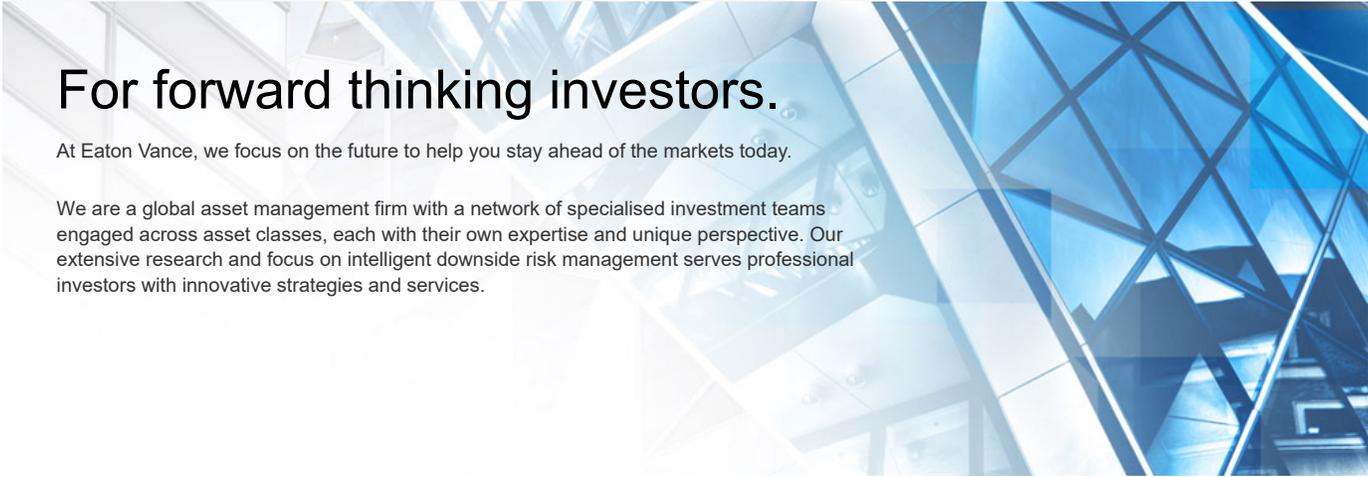


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Regenerative Agriculture - A Rising Solution

May 21, 2024

When Calvert assesses how biodiversity may impact the food production ecosystem, we like to consider how Food and Agricultural Products companies are implementing solutions to mitigate the effects of issues such as land degradation soil erosion and soil health. Regenerative agriculture is a practice Calvert believes can solve the growing global food supply issue and improve the operational and financial performance of companies.



Imani Camp
ESG Senior
Research Analyst
Calvert Research
and Management

No capex, no cry

May 8, 2024

KEY POINTS

1. India's standout growth story is garnering increased attention among emerging markets investors.
2. Optimistic households are borrowing more, causing some concern over the build-up of "China-like" debt risks.
3. While higher private capex would help boost economic activity, the current growth trend appears stable and offers potential upside for fixed income investors.



Emerging Markets Debt

Artificial Intelligence from a Value Perspective: Enabling the Evolution of Compute Power

April 24, 2024

KEY POINTS

1. AI opportunity expands beyond the growth darlings that were the immediate and primary beneficiaries over the past year.
2. Utilities experienced the largest historical relative underperformance to the broader market in 2023; in our view, the reward relative to risk is now quite compelling for a sector that is experiencing an inflection in fundamentals.
3. We believe renewables, such as solar and wind, combined with battery storage, will play an increasing role in behind-the-meter power solutions.



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