

Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to investors.

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[Decarbonizing the Electric Grid: A Climate Transition Investment Framework](#)

By: [Calvert Research and Management](#) | July 18, 2024

Content adapted from a white paper authored by Calvert Research and Management's Jonathan Prager (Executive Director, Research), Henry Mason (Vice President, Research) and Anuj Goyal (Vice President, Research).

"Calvert sees abundant investment opportunities and societal benefits in directly financing the transition to a low-carbon economy by prudently allocating capital where it is needed most: high-emitting sectors that have the capacity and willingness to decarbonize."

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[Too Big to Ignore: The Momentum Factor](#)

By: Aaron Dunn, CFA | & Bradley Galko, CFA | May 22, 2024

KEY POINTS

1. Over the short term (nine months), the momentum factor is at a level occurring only 3% of the time since 1995, when factors began being measured.
2. We believe it's important to focus on why the dominance of momentum factors impacting performance is at a high.
3. We believe a broadening of the market, which has slowly begun over the last few months, is very likely to continue.

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[Artificial Intelligence from a Value Perspective: Enabling the Evolution of Compute Power](#)

By: *Aaron Dunn, CFA* | & *Bradley Galko, CFA* | *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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[Election Cycle is Very Likely to Impact Stocks](#)

By: *Aaron Dunn, CFA* | & *Bradley Galko, CFA* | *February 14, 2024*

KEY POINTS

1. During presidential election years over most of the last century, on average both U.S. large- and small-cap value have outperformed their growth peers.
2. Value vs. Growth's dominance in election years also correlates with U.S. gross domestic product (GDP) growth and detraction.
3. Incumbent candidates and parties keen to win reelection seek to make voters feel financially secure when heading to the polls.

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