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Calvert Developed Markets Ex-U.S. Responsible Index Strategy

Investment Overview

Broad developed markets ex-U.S. research index strategy offering exposure to companies that meet the Calvert Principles for Responsible Investment.

- Calvert's Principles seek to identify companies that operate in a manner consistent with:
 - Environmental sustainability and resource efficiency
 - Equitable societies and respect for human rights
 - Accountable governance and transparent operations
- Designed to closely track the Calvert International Responsible Index which is derived from the largest 1000 companies in developed non-U.S. equity markets

Portfolio Construction

- Define an eligible universe by applying the Calvert Principles of Responsible Investment across approximately 200 peer groups using roughly 200 Key Performance Indicators to measure ESG performance
- Neutralize sector variances by over/underweighting sector weights to more closely align with the starting universe
- Portfolio of approximately 750 holdings that are reconstituted annually and rebalanced quarterly

Investment Team

	Thomas Seto <i>Portfolio Manager</i>	Joined investment management industry in 1991 Joined Calvert in 2016	BS, University of Washington MBA, University of Chicago Booth School of Business
	Jade Huang <i>Managing Director, Director of Applied Responsible Investment Solutions</i>	Joined investment management industry in 2005 Joined Calvert* in 2016	BA, University of California, Berkley MA, Johns Hopkins University
	Christopher Madden, CFA <i>Managing Director, Director of Index Management</i>	Joined investment management industry in 1999 Joined Calvert* in 2016	BS, BA Indiana University
	* Years at Calvert include years at Calvert Research and Management (CRM) and years at Calvert Investment Managements (CIM).		

Benchmark

- MSCI World ex USA Index (Primary)
- Calvert International Responsible Index (Secondary)

Disclosure

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