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# Calvert Green Bond Strategy



## Quarterly Strategy Profile

*(as of Dec 31, 2023)*

## Investment Overview

ESG-integrated strategy that seeks opportunities related to climate change and other environmental issues while maximizing income and preserving capital.

- Invests solely in securities designated as "green" through our proprietary research process

## Strategy Focus

At Calvert, we have developed our proprietary green criteria to try and find the best impact opportunities while enabling portfolio diversification. Our criteria includes three different types of bonds:

- Green projects - Where proceeds are directed to meeting green challenges, such as providing renewable energy resources or electric cars. Green buildings
- Solutions providers - General obligation bonds from corporate issuers who derive at least 50% of revenue from clean technology or environmentally beneficial technology, product or service, such as renewables or water efficiency technologies.
- Leaders - Issuers who demonstrate leadership in material environmental issues and, thereby, elevate industry norms.

## Investment Team

	Vishal Khanduja, CFA <i>Managing Director, Co-Head Broad Markets Fixed Income</i>	Joined investment management industry in 2005 Joined Calvert* in 2012	BE, VJTI, Mumbai, India MBA, University of Iowa
	Brian Ellis, CFA <i>Executive Director, Portfolio Manager</i>	Joined investment management industry in 2006 Joined Calvert* in 2009	BS, Salisbury University <i>*Years at Calvert include years at Calvert Research and Management (CRM) and years at Calvert Investment Managements (CIM).</i>

## Benchmark

- ICE BofA Green Bond Index (USD Hedged)

## Disclosure

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