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# Calvert International Equity Strategy



## Quarterly Strategy Profile

*(as of Jun 30, 2021)*

## Investment Overview

The Strategy offers exposure to a diversified portfolio of high quality, non-U.S. large-cap companies judged to be adequately managing their material ESG risks and opportunities.

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## Investment Philosophy

We seek to provide high total return by investing in sustainable business models that can deliver value over the long-term. Our beliefs:

- The ability of a business to sustain financial success over the long run is key to sustainable share price outperformance.
  - Businesses increasingly need to consider their impact on the world around them.
  - An investment approach that focuses on Sustainability, ESG Integration and Engagement is positioned to minimize risk and capitalize on companies' financial success, which we believe compounds over time.
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## Investment People

- 9 person team with an average of 14 years experience with professionals in Boston and London
- Supported by the broader Calvert equity group with over 50\* investment professionals
- Analyst-driven process with collaborative culture
- High levels of accountability, with distinct lines of responsibility

\*Portfolio managers, analysts, and traders including U.S. and Global/International Equity team members.

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## Process

- A holistic investment approach that focuses on integrating ESG and traditional equity analysis
  - Portfolio exercises ensure team ownership, encourage collaboration and test biases
  - Leverage proprietary tools that provide a common framework through which to understand the quality and sustainability of a business
  - Engage with companies in areas where we identify the potential for ESG improvement
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## Portfolio Construction

- 25-50 common equity holdings\*\*
- Positioned for capital appreciation and long-term compounding
- Alpha driven by bottom-up stock selection
- Positioned for capital preservation
- Companies in the portfolio meet the Calvert Principles for Responsible Investment

\*\*The number of securities/holdings indicated is the current range typically associated with this type of account and will vary depending on account size, client parameters and market conditions prevailing at the time of investment.

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## Investment Team



Christopher M. Dyer, CFA  
Director of Global Equity



Ian Kirwan  
Global Equity Analyst and Portfolio

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