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Calvert International Equity Strategy



Quarterly Strategy Profile

(as of Dec 31, 2023)

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.

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:

- We believe the real value in a stock lies in its ability to Compound earnings over time.
 - For this reason, we focus on the long-term ownership of companies with Sustainable Businesses.
 - A strategy that seeks to balance Upside Potential with Downside Protection has the potential to create sustainable wealth for clients.
 - Most investors price stocks for mean reversion. Our edge is identifying and owning companies that do not revert to the mean.
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Investment People

- 8 person team with an average of 16 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.

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
 - Engages with companies in areas where we identify the potential for ESG improvement
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Portfolio Construction

- 30-40 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.

Investment Team



Christopher M. Dyer, CFA
Managing Director, Co-Head of Eaton Vance
Equity

Ian Kirwan



Managing Director, Co-Head of Eaton Vance
Equity Global Team, Portfolio Manager,
Analyst

Benchmark

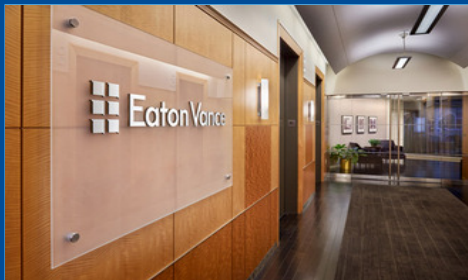
- MSCI EAFE Index
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Disclosure

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