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Quarterly Strategy Profile

(as of Dec 31, 2023)

Investment Overview

- US Large-Cap Growth Responsible Index Strategy offers exposure to companies that meet the Calvert Principles for Responsible Investment (Calvert Principles).
- The Calvert 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 US Large-Cap Growth Responsible Index which is derived from some of the largest 1000 companies in the U.S. equity market
- ESG research also informs engagement efforts on financially material issues

Portfolio Construction

- Define an eligible universe by applying Calvert's ESG research 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 initial universe
- Create an end portfolio of approximately 600 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, Berkeley MA, Johns Hopkins University
	Chris Madden, CFA Managing Director, Director of Index Management	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 Management (CIM).		

Benchmark

- Russell 1000 Growth Index

Disclosure

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