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Calvert US Mid-Cap Core Responsible Index Strategy



Strategy Profile

(as of Dec 31, 2023)




Investment Overview

- US Mid-Cap Core Responsible Index strategy offering 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 Mid-Cap Core 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
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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
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Investment Team

| | | | |
|---|--|--|--|
|  | Thomas Seto Portfolio Manager | Joined investment management industry in 1991 Joined Calvert in 2016 | BS, University of Washington |
|  | Jade Huang, CFA Managing Director, Director of Applied Responsible Investment Solutions | 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 |
|  | <i>* Years at Calvert include years at Calvert Research and Management (CRM) and years at Calvert Investment Management (CIM).</i> | | |

Benchmark

- Russell 1000 Growth Index
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