



# Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to investors.

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### [Forward Thinking: How Global Inflationary Trends Fuel Opportunity for Investors](#)

By: [Forward Thinking](#) | September 12, 2023

In this issue of Forward Thinking, we guide investors seeking to maximize the return potential amid shifting inflationary trends throughout the world, sharing our insights about how to increase their allocations to both global equities and fixed income.

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### [Calvert's Approach to Investing in the Energy Transition](#)

By: [Tarek Soliman](#), [Anuj Goyal](#) |

November 8, 2023

The energy system powers every corner of the modern economy from oil for transport and chemicals, to natural gas for heating and industry, to coal for electricity generation and steel production. Oil and gas provide over 50% of world primary energy which rises to over 80% when including coal, forming the backbone of global supply today and highlighting the magnitude of the task of an energy system transformation. This system keeps the world moving and powers economic activity, but it is prone to geopolitical disruption and price volatility. This volatility has highlighted long-term concerns that Calvert has long held about the extent to which the current global energy system relies on fossil fuels.

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### [AI Innovation Spurs Potential Opportunity in Emerging Markets](#)

By: [Steven Quattry](#) | October 3, 2023

#### KEY POINTS

1. Investors may be overlooking opportunities from AI applications in EM countries.
2. AI is expected to unleash a wave of emerging creators across various digital mediums.
3. Legacy structural problems in EM may create even more potential opportunity for AI.

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*Unsere Emerging Markets und Global Income Inhalte sind auf Deutsch verfügbar.*

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### [Little Known Current Facts About U.S. Equity Investing](#)

By: *Aaron Dunn, CFA* | & *Bradley Galko, CFA* | October 31, 2023

#### KEY POINTS

1. On a three-year annualized basis, value is outperforming growth by over 3%.
2. Seeking out undervalued securities has continuously paid off for the past century.
3. We look beyond how the "Magnificent Seven" have lived up to their name this year.

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## [Increased Demand for Life Science Tools Fuels Potential Investment Opportunity](#)

*By: Aaron Dunn, CFA | & Bradley Galko, CFA | August 21, 2023*

### KEY POINTS

1. We believe life science tools offer an attractive investment emerging from the COVID bubble.
2. In our view, there are many reasons that the sub-sector may experience positive long-term growth.
3. Bottom-up selectivity may identify leading companies unappreciated within the sub-sector.

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## [Premier Office Space Offers Potential Opportunities as Workers Return and Tenants Demand More](#)

By: [Aaron Dunn, CFA](#) | & [Bradley Galko, CFA](#) | June 5, 2023

### KEY POINTS

1. We believe peak work from home is behind us, and that the pendulum has begun to swing.
2. High quality and premier office space is differentiated from traditional office space.
3. Tenants gain increased power in today's environment to seek out a well-financed building.

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