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

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[Engagement update: 80% of Top 100 companies agree to disclose diversity data](#)

By: [John Wilson](#) | November 19, 2021

Investors often lack the information that we need to evaluate corporate diversity performance as a material issue for our investment decisions. This issue brief details Calvert's engagement effort to ask companies to make their EEO-1 reports public, and to release their pay equity data.

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[High yield market remains attractive, but various push-pull factors argue for a watchful investment approach](#)

By: [Will Reardon](#), [Kelley Baccei Gerrity](#)
| August 17, 2021

In this paper, the High-Yield team examine recent developments in the high-yield market and explain where further investment gains can potentially be made.

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Responsible Investing
[Does an Ethnically Diverse Board Mean Better Stock Performance?](#)

By: [Yijia Chen, CFA](#) | November 17, 2021

Washington - Over the last 50 years, we have seen the key driver of the global economy shift from natural resources to human talent, ushering in the era of the "Talent Economy." This megatrend now impacts all major economies as companies place greater focus on intellectual capital and a diverse workforce as material, competitive factors for business success.

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Emerging Markets
[Why Policy Choice Matters for Socioeconomic Mobility in Emerging Markets](#)

By: [Marshall L. Stocker, Ph.D., CFA](#) | November 2, 2021

Boston - Intergenerational mobility has long been considered critical for economic growth in emerging markets (EM) economies, given its association with higher per capita GDP and lower poverty rates. As EM investors, we believe that a better understanding of mobility can yield important insights into the areas of reform that support improved long-term growth and social outcomes.

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Markets and Economy

[Market Doesn't Buy Long-Term Inflation Scenario — Yet](#)

By: Eric Stein, CFA | & Brian Shaw | November 16, 2021

Boston - As inflation concerns have heated up in recent weeks — with Consumer Price Index (CPI) increases over the past two months

exceeding most expectations — people in the non-transitory camp certainly have more to cheer about. But we think the debate over transitory or non-transitory can be misleading, because it frames inflation in a binary way that does not shed light on all the various shorter- and longer-term forces at work.

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[Tapering, Rates and Powell's Future Are Key Topics at Fed Meeting](#)

By: *Eric Stein, CFA* | November 2, 2021

Boston - The Federal Open Market Committee (FOMC) meets this Tuesday and Wednesday, and I expect three topics to be addressed.

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October 31, 2021

In-depth review of asset class and economic activity via impactful charts and analysis.

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[Quarterly Equity Outlook - October 2021](#)

By: *Edward J. Perkin, CFA* | October 29, 2021

The global pandemic continues to impact supply chains, raising input and transport costs and putting pressure on prices in end markets. But we contend that there will be plenty of merchandise for holiday shoppers to buy.

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October 19, 2021

Analysis of global credit markets and where we see future opportunities.

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[Quarterly Income Outlook - October 2021](#)

By: *Eric Stein* | October 15, 2021

Optimism may be tempered compared with three to six months ago, but growth can still be quite strong as people adjust to the new normal.

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October 8, 2021

Overview of the trends and developments in the muni bond markets.

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[Bullish and Bearish COVID Developments: CDC Advisors Say the Delta Surge Is Over](#)

By: *Marshall L. Stocker, Ph.D., CFA* | September 24, 2021

Boston - According to a new analysis by a consortium of researchers advising the CDC, the Delta surge will likely decline steadily now through next spring — without a significant bump up in the winter. As a result, we expect this will be our last weekly update on health policy responses and other COVID developments.

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[Fed Sets 8-Month Tapering Schedule, Starting in November](#)

By: *Eric Stein, CFA* | *September 23, 2021*

Boston - The U.S. Federal Reserve had what I would describe as a moderately hawkish meeting on Wednesday, as it accelerated its timetable for tapering, and set the stage for eventual rate increases.

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[Evergrande's Troubles Predate China's Crackdown on Capitalism](#)

By: *Emerging Markets Team* | *September 22, 2021*

Boston - We have followed developments related to Chinese property developer Evergrande since fall 2020, even more closely since April. With the further deterioration in prices for Evergrande's outstanding securities and the increasing likelihood that the company could declare bankruptcy and default on debt soon, here's an update on what we think.

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[Bearish and Bullish COVID Developments: WHO Doubts Vaccines Alone Can Achieve Herd Immunity](#)

By: *Marshall L. Stocker, Ph.D., CFA* | *September 17, 2021*

Boston - According to a CDC study, unvaccinated Americans are 11 times more likely to die of COVID. Yet among the 29% of U.S. voters who are unvaccinated, 83% told a CNBC survey they do not plan to get the lifesaving shots. Here are this week's health policy responses to the pandemic and other bearish or bullish developments.

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[Bearish and Bullish COVID Developments: 3 Shots Likely the New Norm](#)

By: Marshall L. Stocker, Ph.D., CFA | September 10, 2021

Boston - With an August 31 poll showing that two-thirds of organizations have delayed office re-openings because of COVID-19 variants, let's look at this week's health policy responses and the bearish or bullish developments related to the pandemic.

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[Bearish and bullish COVID-19 developments: All but two states at high levels of transmission](#)

By: Marshall L. Stocker, Ph.D., CFA | August 19, 2021

Boston - With the CDC reporting that all but two of the 50 states are now at high levels of community transmission, let's review the health policy responses and the bearish or bullish developments related to the COVID-19 pandemic for the third week of August.

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[Bearish and bullish COVID-19 developments: Alarming surge in COVID cases among children](#)

By: Marshall L. Stocker, Ph.D., CFA | August 12, 2021

Boston - As the number of U.S. communities with high levels of COVID-19 transmission keeps rising, here's our review of the health policy responses and the bearish or bullish developments related to the pandemic for the second week of August.

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[Bearish and bullish COVID-19 developments: Younger, sicker, quicker](#)

By: Marshall L. Stocker, Ph.D., CFA | August 5, 2021

Boston - As the Delta variant continues to raise levels of community transmission across the U.S., here's our review of the health policy responses and the latest bearish or bullish developments related to the coronavirus pandemic for the first week of August.

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[Fed punts on tapering decision at latest meeting](#)

By: Eric Stein, CFA | July 29, 2021

Boston - The latest meeting of the Federal Open Market Committee proved to be a "steady as she goes" affair. Without much new information forthcoming, the market appeared to view it at the margin as a modestly dovish signal from the Fed.

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[Bearish and bullish COVID-19 developments: Delta variant redux](#)

By: Marshall L. Stocker, Ph.D., CFA | July 28, 2021

Boston - During the past 62 days, the global growth in new cases and cumulative deaths both averaged 0.3% per day — the same rate as on May 27, when we posted our last COVID update. Let's take another quick look at the health policy responses and the latest bearish or bullish developments related to the pandemic.

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[Marking the uncertain course of monetary policy and the markets](#)

By: [Vishal Khanduja, CFA](#) | & [Brian S. Ellis, CFA](#) | July 27, 2021

Boston - U.S. and global economies may continue to strengthen as more people are vaccinated against COVID-19, albeit at uneven rates geographically. We believe the ongoing global recovery and accommodative policies of major central banks should support risk markets in the near term. Looking out a few quarters, however, we think markets could become increasingly volatile depending on the course of monetary policy.

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[Fed to weigh growth, inflation, Delta variant uncertainty at July meeting](#)

By: [Eric Stein, CFA](#) | July 26, 2021

Boston - Monetary policymakers at the U.S. Federal Reserve have a lot on their minds ahead of their meeting on July 27 and July 28. The economy is generally stronger than we perceived a year or so ago — certainly the rebound from the worst of the COVID-19 pandemic has outpaced the initial expectations.

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[Have U.S. economic growth and inflation rates peaked?](#)

By: [Eric Stein, CFA](#) | July 6, 2021

Boston - The big story of the second quarter of 2021 was the sharp reversal in the trend of long-term U.S. Treasury rates and U.S. inflation expectations, which both fell.

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[Transitioning to a new market cycle may require a fresh look at risk](#)

By: Tom Lee, CFA | June 23, 2021

Minneapolis - The COVID-19 pandemic brought the U.S. economy to its knees, with lockdowns, work-from-home mandates and travel restrictions wreaking havoc across the economic landscape. However, recent news shows the U.S. economy is bouncing back. The development and rollout of effective vaccines has allowed a return to some semblance of normalcy.

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[Fed delivers "hawkish surprise" as economy — ad inflation risk — gow](#)

By: Eric Stein, CFA | June 17, 2021

Boston - The June 16 meeting of the Federal Open Market Committee delivered a bit of a hawkish surprise, as the consensus projection for new rate hikes moved up to 2023, compared with March when no FOMC members predicted hikes that early.

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[US census data release reveals population pressures for investors](#)

By: Tom Lee, CFA | June 9, 2021

Minneapolis - The first round of U.S. census data was released at the end of April. As of Census Day on April 1, 2020, the U.S. population stood at 331.5 million. This means the just-completed decade yielded the second-lowest population growth rate for the U.S. since the census was first taken in 1790: a mere 7.4%. Only the decade of the Great Depression experienced a lower growth rate than the 2010s.

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[Hawkish comments by Fed reflect change in tone, not core policy](#)

By: Eric Stein, CFA | June 3, 2021

Boston - Recently, we have heard a slew of what I would call "mildly hawkish" comments from Federal Reserve Board governors and regional Federal Reserve Bank presidents. This is especially interesting because the observations also came from two who are usually considered dovish. All the comments were generally in the direction of slowing the Fed's tapering sooner rather than later and taking the foot off the accelerator.

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