



# 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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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 Quattri](#) | 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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### [Compelling Opportunities Across the Yield Curve and Credit Spectrum](#)

By: Vishal Khanduja, CFA | & Andrew Goodale | August 25, 2023

#### KEY POINTS

1. We believe a shift in allocation towards higher quality securities is prudent.
2. We see compelling opportunities across corporates and securitized sectors.
3. The environment is suited for a flexible and active management approach to fixed income allocation.



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