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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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[New Report Affirms Sustainable Fund Outperformance in First Half of 2023](#)

By: [John Farley](#) | September 13, 2023

[New York](#) - The new "Sustainable Reality" report from the Morgan Stanley Institute for Sustainable Investing affirms the resurgence of performance and interest in environmental, social and governance (ESG) funds in the first half of 2023. The trends identified in the report support Calvert's long-held views on markets and investor interests:

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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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[High Yield Municipal Bonds: Now May Be a Good Time to Invest](#)

By: *Bill Delahunty, CFA* | & *Cynthia J. Clemson* | *September 7, 2023*

KEY POINTS

1. High yield municipal bonds are even more attractive, based on both absolute yields and spreads.
2. Based on snapbacks from past sell-offs and Fed tightening cycles, this HY muni rally may still have room to run.
3. Whether the economy moves to a soft landing or recession, we believe high quality HY munis can hold up well.

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Bill Delahunty, CFA
Portfolio Manager
Municipals



Cynthia J. Clemson
Co-Head of Municipals
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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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Vishal Khanduja, CFA
Co-Head of Broad Markets
Fixed Income



Andrew Goodale
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[Will Rolling T-Bills Be an Uphill Battle in 2023's Second Half?](#)

By: *Andrew Szczurowski, CFA* | & *Chip Driscoll, CFA* | *May 24, 2023*

Boston - Bond investors principally focus on two main risks: credit risk and interest rate risk. However, reinvestment risk, which is rarely top of mind for investors, deserves closer attention. Reinvestment risk is simply the risk that a bond investor will have to reinvest proceeds from maturing bond at a lower rate than they earned previously.

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[FLOATING-RATE LOANS](#) | NAVIGATING THE CURVE

[Loans Shine Bright, Showcasing Resiliency and Value](#)

By: *Andrew N. Sveen, CFA* | & *Christopher Remington* | April 4, 2023

Boston - Last year's hammering of the traditional stock/bond portfolio was less severe for accounts with allocations to senior loans, thanks to the outperformance of loans that was nothing short of dramatic. Immunity from higher interest rates — in fact, participation in them — was key, as was the buoying effect from the robust buying of institutional investors.

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