

The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness.

CALVERT INSIGHTS

How Calvert Helped Create the Barron's Most Sustainable Companies List

By: Calvert Research and Management | March 7, 2024

This marked the seventh year in a row that Calvert scored the 1,000 largest U.S. publicly traded companies across 230 environmental, social, and governance (ESG) performance indicators for Barron's annual list of the "100 Most Sustainable U.S. Companies." The top 100 firms included in Barron's achieved the highest scores across those ESG metrics, ranging from workplace diversity to greenhouse-gas emissions. Here's a brief look at how we did so.

For inclusion on Barron's list, each of these 1000 companies was first selected based on market capitalization and being incorporated and headquartered in the United States. The top 1,000 were then rated on their demonstrated responsibility in five key stakeholder categories: shareholders, employees, customers, community, and the planet. To calculate the ratings, Calvert considered key performance indicators from seven primary vendors, supplemented by other data sources and Calvert independent research, where relevant.

The data was organized into 28 distinct topics, which were then sorted into the five key stakeholder categories. Each company received a rating of 0-100 in each stakeholder category, based on the Calvert research team's proprietary analysis and scoring methodology.

An overall rating for each company was calculated using a weighted average of the five key stakeholder categories, based on Calvert's assessment of the financial materiality of each stakeholder category within the company's industry peer group. In addition, to be considered among the 100 most sustainable companies, a firm needed to be rated above the bottom quartile in all financially material stakeholder categories. In other words, a company's poor performance within any key stakeholder group determined to be financially material disqualified that company from consideration.

The overall lineup represents a wide range of industries, with tech, industrials, and consumer companies all well represented. About a fifth of this year's list are companies that were not among last year's top 100.

The Barron's article and list of top 100 companies is available [here](#), and you can find more details about the methodology and our role in constructing the top 100 list [on our website](#).

Bottom line: Calvert's continued partnership with Barron's on ranking the "100 Most Sustainable U.S. Companies" is an indication that responsible investing remains a desired option in the marketplace. We will persist in examining how companies perform on material ESG issues in comparison to their peers, helping investors gain insight into what leading companies are doing well and what others can do to accelerate their progress.



Calvert Research and
Management

"Calvert's continued partnership with Barron's on ranking the "100 Most Sustainable U.S. Companies" is an indication that responsible investing remains a desired option in the marketplace."

Marketing Communication

To report a website vulnerability, please go to [Responsible Disclosure](#).

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

This website is operated by MSIM Fund Management (Ireland) Limited (MSIM FMIL). The business of Eaton Vance Global Advisors Limited was transferred to MSIM FMIL on 1 October 2021. MSIM Fund Management (Ireland) Limited has been appointed as management company of the Eaton Vance International (Ireland) Funds plc and is responsible for the distribution of the funds together with the distribution of Eaton Vance strategies and strategies of Eaton Vance affiliates. For any queries in respect of the products and strategies referred to on this website, please contact MSIM FMIL at 7-11 Sir John Rogerson's Quay, Dublin 2, D02 VC42, Ireland. MSIM FMIL is regulated by the Central Bank of Ireland with Company Number: 616661.

The value of your investment can go up or down so you may get back less than your initial investment. Past performance is not a guide to future returns.

The information on this webpage is not intended for U.S. residents. To visit our U.S. website [please click here](#).

Eaton Vance Management (Registration No. 1121368) and Parametric Portfolio Associates (Registration No. 1217626) are the registered trade marks of Eaton Vance.