

Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to institutional 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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[Higher Volatility in 2024 May Present Attractive Entry Points for High Yield Bonds](#)

KEY POINTS

- [1. As global central banks near the end of a historical cycle of tightening monetary policy, we believe a moderate recession is a more probable outcome in 2024.](#)
- [2. Increasing dispersion in valuations across rating segments, sectors and individual issuers will continue to provide opportunity and the ability to capture attractive entry points.](#)
- [3. We have maintained our cautious positioning and continue to prefer defensive sectors that trade wide of historical norms, such as health care, given the sector's historically defensive characteristics.](#)

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By: [Emily Wagner, Alysia Rodgers](#) |
January 17, 2024

[New York - The issue of per and polyfluoroalkyl substances, commonly referred to as "forever chemicals," is rapidly evolving, and requires a nuanced approach to evaluate risk to issuers, especially as KPIs specific to PFAS are lacking \(see our \[previous post\]\(#\) for more details\). At Calvert, our research process allows us to apply a discount to reflect both the materiality on stakeholders \(from investors, employees and customers to local communities\) and the impact to an issuer's enterprise value \(equity, holders, debt holders, bankruptcy\). This also considers company actions/response to a controversy.](#)

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By: [Paul Psaila](#) | February 5, 2024

KEY POINTS

- [1. A year into President Lula's term, the political and economic situation in Brazil is better than many had expected.](#)
- [2. The economy will likely grow more than expected as interest rates continue to fall.](#)
- [3. We believe Brazil remains cheap compared to other emerging markets with lower inflation and rates acting as a tailwind for growth.](#)

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[2024 Outlook: Responsible Investing](#)

By: *John Streur* | *December 6, 2023*

Market Decoupling of "E, S and G" Factors Likely to Accelerate in 2024

KEY POINTS

1. The shakeout in the responsible investment industry that began in late 2022 is driving specialist firms to increasingly incorporate financial viability into the analysis of corporate climate and social business objectives.
2. As both specialist firms and mainstream investors have moved towards more intensive and granular ESG research, a consensus is building around the importance of human capital management. In particular, a greater focus is being placed on workforce diversity in differentiating a company's potential for value creation.
3. Decarbonizing the global economy is proving to be a difficult task because the cost of transitioning from fossil fuels to clean energy is currently higher than originally anticipated.

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John Streur
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[Common Ground Between Anti-ESG Politics and Responsible Investors](#)

By: *John Streur* | *October 2, 2023*

Washington - "Anti ESG" stories have been prominent for several months in the United States and we are also beginning to see written policy agendas and proposed legislation. As a global leader in Responsible Investing, we believe it is important to listen carefully to both sides of the ESG debate and eliminate the noise at the extreme. When we focus on what is actually being proposed, shared principles stand out that offer the potential to help evolve and improve responsible investment implementation. Frankly, the debate highlights opportunities to strengthen ESG investing, improve market function and solve long standing problems associated with weak definitions of "ESG" in the investment context.

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