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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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[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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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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[Calvert's Approach to Investing in the Energy Transition](#)

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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[Signal Report Addresses Need for Real Transparency in Electric Utilities](#)

By: *Jonathan Prugel* | & *Anuj Goyal* | *October 16, 2023*

New York - Few industries are as critical to creating a low-carbon future as electric utilities. Currently, the industry's progress appears to be stalled. Emissions from both electricity and heat production rose to 14.8 gigatons in 2022, the highest level ever. Moreover, 90% of power sector emissions come from electricity generation. Considering that Net Zero targets require power sector emissions to fall by nearly 9% per year to 2030, the industry is far off track.¹

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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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[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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[Financial Materiality of PFAS Is Rising](#)

By: Emily Wagner | & Kara Huang | September 7, 2023

New York - At Calvert, one ESG issue we examine that is material to a wide range of companies is the use of per and polyfluoroalkyl substances (PFAS). These are a group of widely used chemicals valued for their versatility in repelling or resisting grease, oil, water and heat. Because they do not break down over time, they are commonly referred to as "Forever Chemicals" and are now widely used in applications like firefighting foams, water-resistant fabric and textiles, non-stick cookware and personal care products. Due to this ubiquitous use, PFAS chemicals can be found in water, air, fish and soil across the globe and have been found in blood levels of people and animals.

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[Why the Market for Sustainable Aviation Fuel Will Grow](#)

By: Jun Goh | August 17, 2023

New York - Calvert's research team examines the potential of different energy sources as the globe transitions into a distributed, lower carbon energy system. In our coverage of Renewable Fuels, we identified Sustainable Aviation Fuel (SAF) as the primary lever for air transportation to reduce emissions.

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[Expanding Access to Homeownership on Tribal Lands](#)

By: *Alexander Payne, CFA* | August 2, 2023

Boston - Even with the deep and liquid mortgage market in the United States, many potential borrowers who fall outside traditional underwriting guidelines are unable to secure a home loan easily. These aspiring homeowners can have stable incomes and good credit, but for one reason or another they fail to qualify for conventional government loan programs, which are largely automated.

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[Proposed EPA Standards Illustrate Importance of Negative Externalities for Investors](#)

By: *Emily Wagner* | July 10, 2023

Washington - On April 6, the U.S. Environmental Protection Agency (EPA) proposed strengthened standards designed to reduce cancer risks related to emissions from chemical and polymers plants. The proposal targets the reduction of air toxins, including ethylene oxide, chloroprene, benzene 1,2-butadiene, ethylene dichloride, vinyl chloride and smog-forming VOCs (volatile organic compounds). According to EPA estimates, this would reduce toxic pollution by over 6,000 tons/year and VOCs by over 23,000 tons/year.¹

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