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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.



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Management

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