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Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to institutional investors.

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INTERNATIONAL/GLOBAL

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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HIGH YIELD | NAVIGATING THE CURVE | OUTLOOK

2024 Outlook: High Yield Bonds

By: Stephen C. Concannon, CFA, Will Reardon | December 6, 2023

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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Where's the Trickle Down? Gender Diversity in Corporate Pipeline Lags the Boardroom

By: Yijia Chen, CFA | March 15, 2024

As March is Women's History Month, it's timely that we review women's headway moving up the corporate ranks and the progress of gender diversity initiatives worldwide.

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Brazilian Economy Boosted by Reasonable Government Legislations and Tight Monetary Policy

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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CALVERT INSIGHTS

Proxy Season Recap — And What's in Store for 2024

By: Nikita Jain | April 4, 2024

The 2022-23 proxy season saw climate change continue to be the focus of most environmental, social and governance (ESG) proposals, with executive compensation and workforce practices also drawing scrutiny.

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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.

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CALVERT INSIGHTS

Property Insurance: The Canary in the Coal Mine for Physical Climate Risk

By: Pietro Marchesano | February 15, 2024

The urgent need to reduce emissions has recently drawn a high level of scrutiny and interest from the financial services sector. Although physical climate risk is often mentioned less than transition risk, its effects will become increasingly evident over time. The insurance industry offers an important perspective on the evolving materiality of physical risk and ways to address it.

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CALVERT INSIGHTS | RESPONSIBLE INVESTING

Calvert's Research Process Examines PFAS Risk, Remediation

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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CALVERT INSIGHTS | OUTLOOK | RESPONSIBLE INVESTING

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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CALVERT INSIGHTS | RESPONSIBLE INVESTING

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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