



# 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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### [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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### [AI Innovation Spurs Potential Opportunity in Emerging Markets](#)

By: [Steven Quattry](#) | 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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### [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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### [Addressing Major Changes Relevant to Long-Term Responsible Investors](#)

By: *John Streur* | *May 23, 2023*

**Washington** - As we settle into 2023, we believe long-term responsible investors focused on risk management and opportunity capture must consider material changes impacting four areas:

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