

Advisory Blog

Timely insights on the issues that matter most to investors and their clients

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By: [Jade Huang](#) | June 10, 2021

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[US census data release reveals population pressures for investors](#)

By: [Tom Lee, CFA](#) | June 9, 2021

Minneapolis - The first round of U.S. census data was released at the end of April. As of Census Day on April 1, 2020, the U.S. population stood at 331.5 million. This means the just-completed decade yielded the second-lowest population growth rate for the U.S. since the census was first taken in 1790: a mere 7.4%. Only the decade of the Great Depression experienced a lower growth rate than the 2010s.

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[Taking a shine to acute care hospitals post-pandemic](#)

By: [James Croom, CFA](#), [Stephen C. Concannon, CFA](#) | June 8, 2021

Boston - Earlier in the year, we saw fairly consistent leadership in the high-yield market by some of the more cyclical sectors, led by entertainment & film, air transportation, publishing & printing and energy. One area in particular that has captured our attention is acute care hospitals.

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Jade Huang
Portfolio Manager
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[Call for renewable energy gains momentum, even amid pandemic](#)

By: *Chris Madden* | *May 12, 2021*

Washington - Companies directly involved in energy solutions had a strong 2020, even as the world faced a pandemic that dealt severe blows to supply chains and manufacturing, not to mention its devastating impact on public health. During the crisis, climate change took on new emphasis with investors, businesses and governments — as well as the public — in light of shifts in pollution and weather patterns.

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Chris Madden
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By: *Calvert Research and Management* | *April 30, 2021*

Key issues and trends that illustrate what you need to know about Responsible Investing.

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[Investment Grade Fixed Income](#) | **Responsible Investing** [Green bond issuance in Q1 triples from a year ago](#)

By: *Henry Mason* | & *Brian S. Ellis, CFA* | *April 22, 2021*

Washington - Green bond issuance was \$111 billion in the first quarter (Q1), nearly three times the amount in Q1 2020 after the onset of the COVID-19 pandemic depressed issuance in March.¹

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Henry Mason
ESG Research Associate
Calvert Research and
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Picture of Brian S. Ellis, CFA

Brian S. Ellis, CFA
Calvert Fixed Income
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[Transparency Tool can help advisors with ESG impact conversations](#)

By: *Edward Kamonjoh* | *April 21, 2021*

Washington - Calvert has long advocated for greater transparency in the asset management industry. The more investors know about exactly what companies they own — and what impact their holdings have on the planet and people — the

easier it can be to make informed decisions about what to include in an individual portfolio.

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Edward Kamonjoh
Director of Impact
Management
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[An unwanted record: 415 and rising](#)

By: John Miller | April 20, 2021

Washington - January 2021 set a new, unenviable climate change record, as the monthly average global concentration of carbon dioxide (CO₂) — a potent greenhouse gas (GHG) — crossed 415 parts per million (ppm).¹ Concentration levels of CO₂ are higher today than at any recorded point in the past 800,000 years.² To bend this GHG concentration arch back toward safe levels, real structural change in how emissions-intensive segments of the economy operate are needed now. Namely, the production and consumption of fossil fuels must decline.

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John Miller
VP and ESG Senior
Research Analyst
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[Municipal Bonds](#) | Responsible Investing

[Tackling climate change through the municipal bond market](#)

By: Lauren Kashmanian | April 19, 2021

New York - This Earth Day, we celebrate the increasing global attention toward environmental stewardship and look for ways the investment community can promote sustainability. In the municipal bond market, investors can invest in projects that aim to provide a meaningful environmental benefit to municipalities and their constituents across the United States.

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Lauren Kashmanian
Senior Portfolio Manager
Parametric

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[One-third of global assets now aligned with Net Zero Asset Managers initiative](#)

By: Reed Montague | April 13, 2021

Washington - As of March 29, a new wave of 43 asset managers has joined the Net Zero Asset Managers initiative in support of achieving net zero greenhouse gas (GHG) emissions by 2050, or sooner. In line with the Paris Agreement and global efforts to limit warming to 1.5 degrees Celsius, this initiative brings the power of the investment management community squarely behind these efforts.

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Reed Montague
ESG Research Analyst
Calvert Research and
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[Introducing Tools of Change, the 2021 Calvert Engagement Report](#)

By: *John Wilson* | April 6, 2021

Washington - Calvert Research and Management has a long history of supporting the health and sustainability of global markets, and improving investment returns, through its active engagement with corporations.

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John Wilson
Director of Corporate
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[Sustainable funds see record inflows - and strong performance - amid pandemic](#)

By: *Anthony Eames* | April 1, 2021

Washington - In the U.S. and elsewhere, grappling with COVID-19 and its aftermath threw issues like income inequality, access to health care and other socioeconomic divisions into sharp relief. Against this backdrop, environmental, social and governance (ESG) strategies made headway with investors. In 2020, U.S. investors poured more assets into sustainable funds than ever before, besting prior calendar-year records set in both 2018 and 2019.

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Anthony Eames
Director of Responsible
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[How responsible investments can make a difference](#)

By: *Anthony Eames* | March 25, 2021

Washington - The demand for environmental, social and governance (ESG) solutions is building, creating the potential for additional questions from investors. Some may wonder whether investments and investor actions really can make a difference in advancing ESG issues. Others may wonder how to determine which asset managers are truly committed to Responsible Investing, and which are merely "greenwashing" their existing operations and strategies.

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Anthony Eames
Director of Responsible
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[Beyond futures: What water means to us](#)

By: Yijia Chen, CFA | & Jade Huang | March 22, 2021

Washington - History was made in December 2020 when the first water futures index began trading on the Chicago Mercantile Exchange. The underlying index tracks the price of water rights leases and sales transactions across the five largest and most actively traded regions in California. Since inception, the futures price has increased 10.24% as of February month-end, compared to 2.38% price increase of S&P 500 in the same time window.¹

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Picture of Yijia Chen, CFA

Yijia Chen, CFA
ESG Quantitative
Research Analyst
Calvert Research and
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Jade Huang
Portfolio Manager
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[Calvert's approach to ESG data and the creation of Custom Composite Indicators](#)

By: Calvert Research and Management | March 17, 2021

Washington - Calvert's ESG research is differentiated by its focus on financially material ESG issues, or ESG issues that present risks and opportunities that may significantly impact a company's profitability, valuation or access to capital.

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[Emerging Markets Debt](#) | [Global Investing](#) | [Responsible Investing](#) [Emerging markets debt - ESG engagement through an expert approach](#)

By: Emerging Markets Debt Team | March 16, 2021

Boston - ESG analysis has long played a critical role in the country research and investment selection process for the Eaton Vance emerging markets team. With increased industry focus on ESG investing and a growing EM bond universe, engagement is now more important than ever before.

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