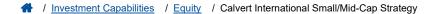




**INVESTMENT CAPABILITIES** 

CONTACT



# Calvert International Small/Mid-Cap Strategy

#### Investment Overview

The Strategy seeks to offer exposure to a broadly diversified portfolio of high quality, non-U.S. small- and mid-cap companies judged to be adequately managing their material ESG risks and opportunities.

### Investment Philosophy

We focus on three definable inputs: Quality, Valuation, and Time (QVT). Our focus on quality drives a preference for well-entrenched franchises with durable and scalable business models, typically benefitting from either structural growth (compounders) or structural change (improvers). We believe a disciplined combination of quality in a reward-to-risk framework with a long-term mindset can uncover sources of alpha in the broad and inefficient small cap universe.

## Investment People

- 6 person team with an average of 18 years experience with professionals in London, Dublin and Boston
- Supported by the broader Calvert equity group with over 50 investment professionals
- Analyst-driven process with collaborative culture
- High levels of accountability, with distinct lines of responsibility

#### **Process**

- Structured to implement our philosophy in a disciplined and repeatable reward-to-risk framework
- Portfolio exercises ensure team ownership, encourage collaboration, and test biases
- Ensures all research adds value working list, wish list, research library
- Clearly defined portfolio construction and risk management parameters

#### Portfolio Construction

#### Strategy Targets:

- 100-150 Holdings
- Quality/core bias
- Alpha driven by bottom-up stock selection
- Positioned for capital preservation in addition to capital appreciation
- Companies in the portfolio meet the Calvert Principles for Responsible Investment

# **Investment Team**



Aidan M. Farrell

Managing Director, Head of Non-US

Small/Mid Cap

Joined investment management industry in 1996 Joined Eaton Vance in 2015

# Benchmark

MSCI EAFE Small/Mid Cap Index



**Investment Capabilities** 

Contact

Fixed-Income
Equity
Alternative

# **HEADQUARTERS**One Post Office Square Boston, MA 02110

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