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Calvert US Mid Cap Core Responsible Index Strategy

Investment Overview

- US mid-cap core responsible index strategy offering exposure to companies that meet the Calvert Principles for Responsible Investment (Calvert Principles).
 - The Calvert Principles seek to identify companies that operate in a manner consistent with:
 - Equitable societies and respect for human rights
 - Accountable governance and transparent operations
 - ESG research also informs engagement efforts on financially material issues
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Portfolio Construction

- Define an eligible universe by applying Calvert's ESG research across approximately 150 peer groups using roughly 300 Key Performance Indicators to measure ESG performance
 - Neutralize sector variances by over/underweighting sector weights to more closely align with the initial universe
 - Create an end portfolio of approximately 600 holdings that are reconstituted annually and rebalanced quarterly
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Investment Team



Thomas Seto
Portfolio Manager

28 years of industry
experience
3 years at Calvert

BS, University of
Washington



Chris Madden, CFA
Co-Director of Index Management,
Portfolio Manager

20 years of industry
experience
15 years at Calvert*

BS, BA, Indiana University



Jade Huang, CFA
Co-Director of Index Management,
Portfolio Manager

14 years of industry
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12 years at Calvert*

BA, University of California,
Berkeley
MA, Johns Hopkins
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Benchmark

- Russell 1000 Growth Index
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