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RESPONSIBLE INVESTING

Tools of Change: 2023 Calvert Engagement Report

By: Calvert Research and Management | September 13, 2023

Through engagement, Calvert seeks to collaborate with companies in which we invest to help them identify and manage financially material environmental, social and governance (ESG) risks and opportunities in their businesses. In 2019-2020, these important issues included dialogues on public disclosure of EEO-1 data, improving board/employee diversity, setting greenhouse gas (GHG) emissions targets, workplace rights and the ability to manage through a global energy transition.

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EMERGING MARKETS | GLOBAL INVESTING

The India Opportunity

By: Kristian Heugh | & Anil Agarwal | March 11, 2024

KEY POINTS

1. We see strong tailwinds for growth over the next decade, including India's young population and ongoing policy reforms that support a strong infrastructure.

2. While underrepresented in equity indexes, India has consistently demonstrated stand-out performance, outperforming the S&P 500 Index over 1-, 5-, 10-, and 20-year periods.[1]

3. India offers a broad opportunity set for bottom-up stock picking and long-term investors.

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Managing Director
Head of Global Opportunity



Anil Agarwal
Managing Director
Director of Research Global Opportunity

EMERGING MARKETS

Indonesia's Economic Achievements and Strategic Position Are Likely to Draw Global Investors

By: Steven Quattry | March 7, 2024

KEY POINTS

1. Indonesia is the second-fastest-growing, trillion-dollar economy in the world, with estimated average growth of 5% annually for the next five years.

2. Under former President Jokowi, Indonesia's inflation fell from 7.2% to 2.6% as infrastructure investments halved logistics costs and enhanced efficiency.[1]

3. Indonesia just crossed the $5,000 GDP per capita threshold typically associated with accelerating growth in key consumption categories.

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Steven Quattry
Portfolio Manager
Next Gen Emerging Markets Strategy

EMERGING MARKETS | EQUITIES | HIGH CONVICTION ACTIVE

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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