



# Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to investors.

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### [Following a choppy Q1, high yield bonds appear poised to strengthen](#)

By: [Stephen C. Concannon, CFA](#), [James Croom, CFA](#) | June 10, 2021

Although the U.S. high-yield market faced some challenging crosscurrents in Q1, it appears to have entered a recovery phase -- supported by economic growth, falling default rates, and U.S. monetary and fiscal policies.

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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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Emerging Markets Debt

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By: [Emerging Markets Team](#) | June 16, 2021

**Boston** - One of the key macro indicators of value in emerging markets (EM) debt is the [real interest-rate differential with developed-market debt](#) — the spread between EM debt and developed markets, after adjusting for anticipated inflation in respective countries. By that measure, in the wake of first-quarter volatility, we see EM debt as offering a number of [value opportunities](#).

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*By: John Wilson | March 12, 2021*

**Washington** - At Calvert, we have used the power of our proxy vote to hold boards accountable for their attention to diversity for three decades. This year, expectations for corporate diversity are rising, and we are more aware than ever of the value of diverse leadership for long-term corporate performance. For this reason, we are increasing our standards for board diversity.

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*By: John Wilson | January 26, 2021*

**Washington** - Calvert has advocated for greater corporate workforce diversity for decades, and increasingly investors and corporate leaders are recognizing the value of diversity as a driver of financial performance over the long term. Because research indicates that diversity is likely material to company performance, investors require consistent, comparable and complete information about diversity performance. However, this information is often lacking.

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*By: John Wilson | January 25, 2021*

Investors often lack the information that we need to evaluate corporate diversity performance as a material issue for our investment decisions. This issue brief details Calvert's engagement effort to ask companies to make their EEO-1 reports public, and to release their pay equity data.

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