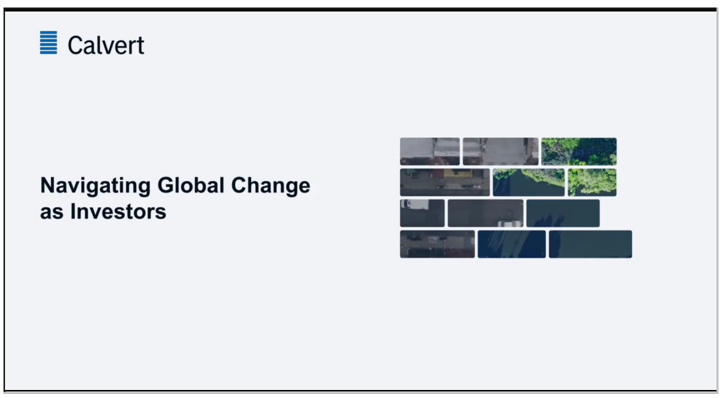
# A leader in Responsible Investing for 40+ years

Calvert offers a full range of Responsible Investing solutions for individuals, advisors and institutions seeking competitive returns and positive impact.

Explore Solutions | View Insights

## Partner with a Leader

Calvert has achieved many milestones over four decades of leadership and innovation in Responsible Investing.




Navigating Global Change as Investors

What does global change mean for long-term investing and how should you respond? Get answers from an industry leader.

Learn more about Calvert —

**1976**
Calvert Investment Management (CIM) founded

**1986**
First shareholder proposal

**1992**
Launched first non-US equity ESG portfolio
**Calvert International Equity**

**1999**
Indigenous Peoples' Rights

**2003**
UNEP
CDP

**2005**
Launche
asset al
portfolic
**Asset A**

1976 1980 1990 2000

1982
US SIF
The Forum for Sustainable and Responsible Investment
Launched **Calvert Balanced Portfolio**

1989
Ceres

1987
Launched first ESG bond portfolio **Calvert Bond**

1995
**Calvert Impact Capital** launched

2001
UN Global Compact

2004
GRI Empowering Sustainable Decisions

20

## Leadership Team

Calvert has one of the industry's largest and most diverse teams of ESG professionals, spanning research, engagement and investment solutions.

Meet our team

# Investment Solutions

Our investment solutions cover a wide range of financial objectives, risk profiles and investor priorities.

## Exchange-Traded Funds

Indexed and active strategies that cover a range of key asset classes and can potentially serve as core portfolio holdings.

Explore ETFs —

## Mutual Funds

Active and passive fund offerings that invest across the global capital markets.

Explore our funds —

## Separately Managed Accounts

Customized strategies that give clients greater control over their investments and taxes.

See the advantages of SMAs —

## Responsible Allocation Models

An easy and practical approach to building diversified, ESG-focused portfolios.

Explore our guided model solutions —

## Calvert Research Indexes

The terms and definition most relevant to Responsible Investing.

Learn more about Calvert indexes —

**$37.5B**

in assets under management as of December 31, 2023

We offer one of the industry's broadest selections of Responsible Investing strategies.

| | |
|---|---|
| Active Equity | 11 |
| Passive Equity | 7 |
| Fixed Income | 12 |
| Allocation | 6 |
| Thematic | 3 |

## Differentiated Research

Calvert's research is distinguished by its breadth and depth, industry-specific expertise, and focus on materiality. By evaluating a company's ability to navigate financially material ESG issues, Calvert identifies investment opportunities and risks that might otherwise not be apparent.

Learn about our research process

## Active Engagement

Calvert actively works with companies on issues such as setting GHG reduction targets, improving diversity, and adopting water stewardship policies. Experience has taught us that working directly with the companies we invest in can drive positive change and improve shareholder value.

Learn how we engage

# Featured Funds

See all funds —

CEYIX

*As of Mar 31, 2024*

### Calvert Equity Fund

Class I Inception
11/01/99

Net Assets
$7.2B

See details —

CWVIX

*As of Mar 31, 2024*

### Calvert International Equity Fund

Class I Inception
02/26/99

Net Assets
$1.0B

See details —

CSVIX

*As of Mar 31, 2024*

### Calvert Small-Cap Fund

Class I Inception
04/29/05

Net Assets
$3.2B

See details —

CBAIX

*As of Mar 31, 2024*

### Calvert Balanced Fund

Class I Inception
12/27/04

Net Assets
$1.2B

See details —

# Ready to invest responsibly?

## For advisors

Go

Tips for talking to clients about Responsible Investing

Go

Visit our Advisor Resource Center to learn more

## For investors

Talk to your advisor about Responsible Investing and Calvert funds

Go

# How to talk to your clients about Responsible Investing

Investors are increasingly interested in discussing how environmental, social and governance (ESG) strategies can be implemented into their portfolios. Available data indicates that investors across age ranges and income levels are showing greater interest in ESG investing. Where client and advisor interests go, assets follow.

However, an April 2019 survey by InvestmentNews, sponsored by Calvert, revealed that only 21% of financial advisors were proactive in initiating ESG conversations, despite the fact that 42% of investors surveyed preferred to work with an advisor for guidance on ESG investments. Here are some tips for starting the conversation.

**Be ready to ask questions…**

In addition to asking clients about their financial goals and risk tolerance, ask whether ESG issues are important to them, and how they would like to factor key issues like climate change, data security or fossil fuels into their investing decisions.

**…and answer questions**

Some of the factors that may have discouraged clients from pursuing ESG investing are lack of knowledge, difficulty evaluating ESG performance, limited investment opportunities and troubles researching ESG investments — problems that advisors are well-equipped to address.

**Performance matters**

Contrary to the dated perceptions of ESG investing, there is no "penalty" or drop in performance inherent with ESG investing — results have shown that ESG investing is generally competitive with its non-ESG investing counterparts.

**Know your options**

Every client's needs are different. Responsible Investing has grown significantly and can be a viable option in a client's portfolio.

# How to talk to your financial advisor about Responsible Investing and Calvert funds

Calvert funds can be purchased through financial advisors or via online brokers. While each brokerage firm is different, many include selections from diversified families of responsibly invested mutual funds, encompassing active and passively managed equity, income, alternative and multi-asset strategies.

While each online broker-dealer may have a slightly different process, here's a general look at the steps required for online investing.

**Step 1: Assess your investment objectives**
Review your financial goals and the time horizon for the investment, as well as your tolerance for risk. In addition, you may want to take into account environmental, social and governance (ESG) issues that are important to you. For example, you may be interested in investments that examine the relevant risks and opportunities associated with climate change.

**Step 2: Review your options**
Companies like Calvert have an increasingly wide variety of products that consider ESG issues in their investment process. You may want to examine how an asset manager selects companies to invest in to see if they factor ESG issues into these decisions. You also may want to consider how an asset manager engages with companies and uses its proxy votes to facilitate change.

**Step 3: Select your investments**
Determine which investments are appropriate for achieving your financial goals. If you have a financial advisor, talk to them about your financial goals and ESG topics that are important to you. Financial advisors are becoming more knowledgeable about Responsible Investing, but may not be comfortable bringing the topic up themselves.

Calvert

# Explore the impact of our funds

We analyze how companies affect the environment and our society. And we actively engage those companies to help them perform better while doing more good.

View metrics for: Calvert Emerging Markets Equity Fund (CVMIX)

| | | |
|---|---|---|
| Toxic Emissions | 100% | Lower than the Russell 1000 Index |
| Carbon Emissions | 87% | Lower than the Russell 1000 Index |
| Water Consumption | 89% | Lower than the Russell 1000 Index |
| Tobacco | 100% | Lower than the Russell 1000 Index |

View our full engagement and impact methodology and disclosure.

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# Stay in the know

Sign up for the latest responsible investing perspectives from Calvert.

First Name *

Last Name *

Email *

Phone

I am an: Investor

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Investment Solutions

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- Active Engagement
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- Calvert Impact Tool
- Advisor Resource Center
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Effective January 3, 2017, Eaton Vance Distributors, Inc. replaced Calvert Investments Distributors, Inc. ("CID") as the principal underwriter of Calvert-advised mutual funds following the acquisition by Calvert Research and Management ("CRM") of substantially all the business assets of Calvert Investment Management, Inc. ("CIM"). CRM has also replaced CIM as the Investment adviser for certain open-end mutual funds.

Eaton Vance Distributors, Inc. does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision.

Shares of Calvert open-end mutual funds may be purchased by delivering an application to the Fund's transfer agent or through financial intermediaries. Shares of Calvert ETFs may be bought and sold throughout the day on the exchange through any brokerage account. Shares are not individually redeemable from an ETF, however, shares may be redeemed directly from an ETF by Authorized Participants, in large creation/redemption units. The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

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