

# Calvert Research and Management



Calvert, a global leader in Responsible Investing, is now bolstered by the strength and resources of Eaton Vance.

## Eaton Vance Investment Affiliates

**EVM** Eaton Vance  
Management

History dating to: 1924  
AUM: \$153.0 billion<sup>1</sup>

**Parametric**

Founded: 1987  
AUM: \$197.7 billion

ATLANTA CAPITAL

Founded: 1969  
AUM: \$20.4 billion

**Hexavest**

Founded: 2004  
AUM: \$15.1 billion<sup>2</sup>

**Calvert**

Roots tracing to : 1976  
AUM: \$9.8 billion<sup>3</sup>

- **324** investment professionals globally with over **15 years** average industry experience
- Broad **distribution** capabilities and operational **infrastructure**
- **\$380.9 billion** in assets under management<sup>4</sup>

<sup>1</sup>As of March 31, 2017.

<sup>2</sup>On August 6, 2012, Eaton Vance acquired a 49% interest in Hexavest Inc., a Montreal-based investment advisor.

<sup>3</sup>On December 30, 2016, Calvert Research and Management, a newly formed Eaton Vance subsidiary, completed its acquisition of substantially all of the business assets of Calvert Investment Management, Inc.

<sup>4</sup>Eaton Vance Management and its affiliates as of March 31, 2017

# This is Responsible Investing



We believe the Four Pillars are the best way to achieve a positive impact and favorable investment results.



## Performance

Our first responsibility is to seek strong portfolio returns.



## Research

We evaluate all material ESG factors that influence a company's business results — moving beyond negative, values-based screens.



## Engagement

As shareholders, we actively engage company management to help drive performance.



## Impact

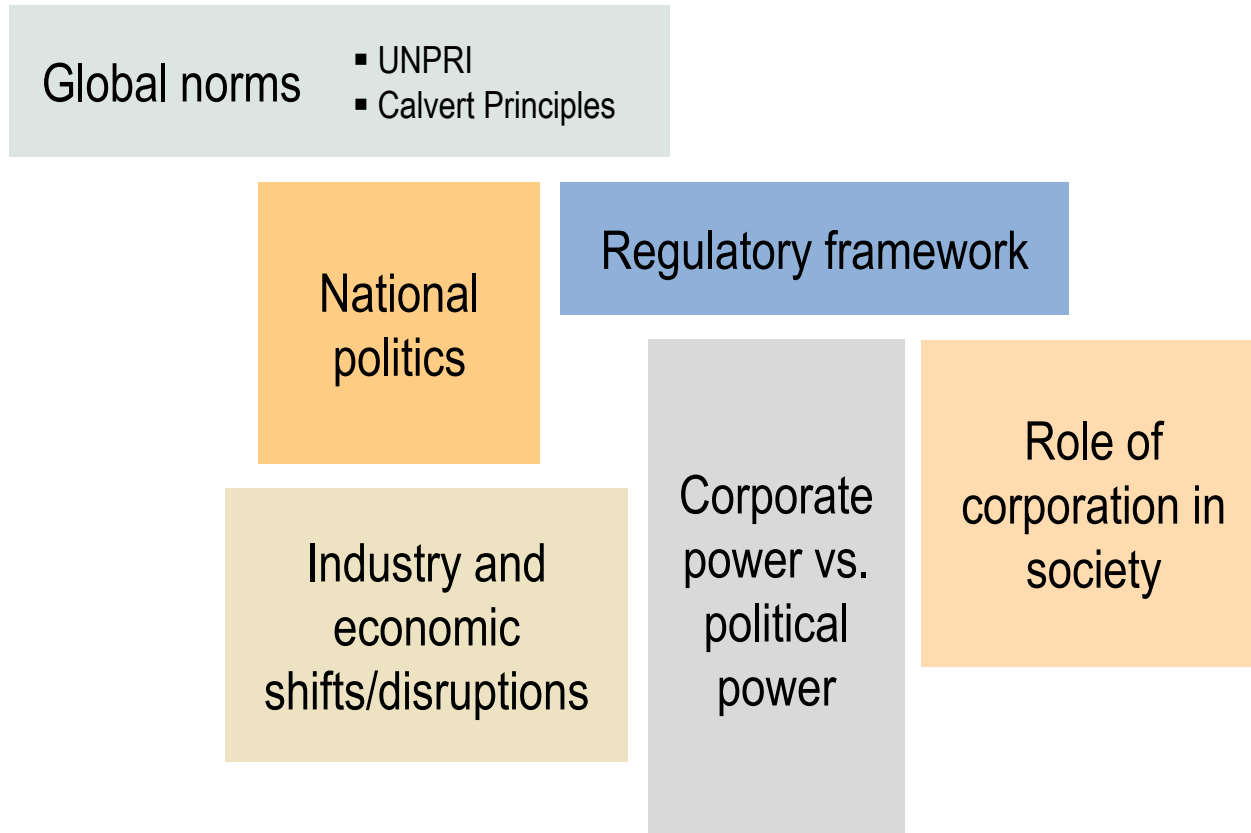
We believe the impact of your investments should be material and measurable.

# Addressing the politics of sustainability



## STRATEGIC FRAMEWORK

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# Thank You!

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Learn more at: [Calvert.com](https://www.calvert.com)

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