



The Forum for Sustainable and Responsible Investment

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Sustainable, Responsible and Impact Mutual Fund and ETF Chart

Fund Profile:

Calvert Global Energy Solutions Fund C

General Fund Information

Ticker: CGACX

Assets under management (AUM): \$81.4M (in US\$ millions)

General Fund Type: International, Global, Foreign

Specific Sizes or Types of Investments: Natural Resources

Financial Objective: The Fund seeks long-term growth of capital through investment in equity securities of companies active in the sustainable energy solutions sector.

Specific ESG Focus: Addressing the climate change crisis is essential to ensuring a sustainable future. A shift away from fossil fuels requires a sharp focus on developing sustainable energy solutions, energy efficiency, and the broadest array of energy options. The Fund provides an investment opportunity for climate change solutions and renewable energy development. The Fund seeks to invest in companies that are market leaders in sustainable energy solutions or that are significantly involved in the sustainable energy solutions sector. Sustainable energy solutions include renewable energy (solar, wind, geothermal, biofuel, hydrogen, biomass and other renewable energy sources that may be developed in the future), technologies that enable these sources to be tapped, and services or technologies that conserve or enable more efficient use of energy. The Fund will invest in ways consistent with Calvert's philosophy that long-term rewards to investors will come from companies and other entities whose products, services, and methods contribute to a more sustainable future. The Fund will focus on environmental, social, and governance (ESG) factors that promote and encourage sustainable solutions.

To invest, call: 800.368.2748

Fund Institution Information

Institution Name:

Calvert Research and Management

Mutual Funds Description: Established in 1976, Calvert is a diversified investment management firm serving individual and institutional investors. Offers a wide array of products including more than 40 equity and fixed income mutual funds, workplace retirement options, and a national 529 college savings program. Recognized as a leader in taxable bond investing, Calvert also manages the largest family of mutual funds in the US that feature integrated environmental, social, and governance research.

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Account Minimums

Minimum Account: \$2,000

Minimum IRA: \$1,000

Methodology

Screening Venue: In-house

Screening Party: Calvert's Sustainability Analysts and KBI International

Screening Database Used: Calvert Proprietary Database

Screening Process: Calvert Global Energy Solutions Fund seeks to invest in companies that:

- Demonstrate leadership in providing solutions to the climate change crisis through renewable energy and other alternative environmental technologies.
- Take positive steps to improve environmental management and performance, and provide innovative solutions to environmental problems through their products, services and emerging technologies.
- Treat their employees with dignity and respect in the workplace.
- Observe appropriate international human rights standards and respect the rights of Indigenous Peoples.
- Produce or market products and services that are safe and enhance the health or quality of life of consumers.
- Contribute to the quality of life of the communities where they operate and are responsive to stakeholder concerns and expectations.
- Exhibit sound policies and practices with respect to corporate governance and business practices.

Calvert Global Energy Solutions Fund seeks to avoid investing in companies that:

- Contribute directly to the systematic denial of basic human rights.
- Maintain poor environmental compliance and performance practices.
- Demonstrate poor corporate governance or engage in unethical business practices.
- Own or operate new nuclear power plants.

Proxy Voting Information

Proxy Voting Guidelines or Policies: [Open external link in new window](#)

Proxy Voting Records: [Open external link in new window](#)

Specific Screening Information by Category

Environment

- **Climate / Clean Technology:** *Combination of Positive and Restricted/Exclusionary Strategies* - The Fund normally invests at least 80% of its net assets in equity securities of U.S. and non-U.S. companies whose main business is alternative energy or that are significantly involved in the alternative energy sector. Alternative energy includes renewable energy (solar, wind, geothermal, biofuel, hydrogen, biomass and other renewable energy sources that may be developed in the future), technologies that enable these sources to be tapped, and services or technologies that conserve or enable more efficient use of energy.
- **Pollution / Toxics:** *Combination of Positive and Restricted/Exclusionary Strategies*
- **Other Environmental:** *Combination of Positive and Restricted/Exclusionary Strategies* - The Fund seeks to invest in companies that are market leaders in sustainable energy solutions or that are significantly involved in the sustainable energy solutions sector. Sustainable energy solutions include renewable energy (solar, wind, geothermal, biofuel, hydrogen, biomass and other renewable energy sources that may be developed in the future), technologies that enable these sources to be tapped, and services or technologies that conserve or enable more efficient use of energy.

Social

- **Community Development:** *Combination of Positive and Restricted/Exclusionary Strategies*
- **Diversity & Equal Employment Opportunity:** *Combination of Positive and Restricted/Exclusionary Strategies*
- **Human Rights:** *Combination of Positive and Restricted/Exclusionary Strategies*
- **Labor Relations:** *Combination of Positive and Restricted/Exclusionary Strategies*

Governance

- **Board Issues:** *Combination of Positive and Restricted/Exclusionary Strategies*
- **Executive Pay:** *Combination of Positive and Restricted/Exclusionary Strategies*

Products

- **Alcohol:** *Restricted/Exclusionary Investment*
- **Animal Welfare:** *Restricted/Exclusionary Investment*
- **Defense/Weapons:** *Restricted/Exclusionary Investment*
- **Gambling:** *Restricted/Exclusionary Investment*
- **Tobacco:** *Restricted/Exclusionary Investment*

Other

- **Shareholder Engagement - Private Dialogue:** Conducted with companies on environmental, social or governance issues

Performance Data

Data provided by: Bloomberg - Information current as of April 30, 2019

Year-to-date rate of return: 18.43%

1-year rate of return: -1.55%

3-year rate of return: 4.52%

5-year rate of return: -1.16%

10-year rate of return: -2.08%

Previous year rate of return: -20.18%

Management fee: 0.87%

Expense ratio: 2.03%

Standard deviation: 19.6%

Benchmark used: Ardour Gbl Alternative Energy | [External link](#)

Disclaimer: Investment in mutual funds involves risk, including the possible loss of principal invested. The Fund is subject to the risk that stocks that comprise the energy sector may decline in value, and the risk that prices of energy (including traditional sources such as oil, gas or electricity) or alternative energy may decline. The stock markets in which the Fund invests may also experience periods of volatility and instability. In addition, shares of the companies involved in the energy industry have been more volatile than shares of companies operating in other, more established industries. Consequently, the Fund may tend to be more volatile than other mutual funds. Lastly, foreign investments involve greater risks than U.S. investments, including political and economic risks and the risk of currency fluctuations. Holdings are considered by the criteria relevant to the alternative energy sector, including specific issues related to human rights and indigenous peoples' rights.