



ASSESSMENT REPORT 2020

Calvert Research and Management

Organisational Overview

This section provides an overview of your organisation. These characteristics are used to define your peer groups.

MAIN CHARACTERISTICS	
Name	Calvert Research and Management
Signatory Category	Investment Manager
Signatory Type	Fund management; Fund of funds, manager of managers, sub-advised products
Size	US\$ 10 - 29.99 billion AUM
Signed PRI Initiative	2006
Region	North America
Country	United States
Disclosure of Voluntary Indicators	100% from 41 Voluntary indicators

YOUR ORGANISATION'S ASSETS UNDER MANAGEMENT (AUM)†		
Asset Class	Internally Managed	Externally Managed
Listed equity	10-50%	10-50%
Fixed income	10-50%	<10%
Private equity	0	0
Property	0	0
Infrastructure	0	0
Commodities	0	0
Hedge funds	0	0
Fund of hedge funds	0	0
Forestry	0	0
Farmland	0	0
Inclusive finance	0	0
Cash	0	0
Money market instruments	0	0
Other 1	0	0
Other 2	0	0

† Asset classes were aggregated to four ranges: 0%; <10%; 10-50% and >50%

Summary Scorecard

AUM	Module Name	Your Score	Your Score	Median Score
	01.Strategy & Governance	A+		A
Indirect - Manager Sel., App. & Mon				
10-50%	02. Listed Equity	A		A
<10%	03. Fixed Income - SSA	E		B
<10%	04. Fixed Income - Corporate Financial	E		A
<10%	05. Fixed Income - Corporate Non-Financial	E		A
<10%	06. Fixed Income - Securitised	E		A
Direct & Active Ownership Modules				
10-50%	10. Listed Equity - Incorporation	A+		A
10-50%	11. Listed Equity - Active Ownership	A		B
<10%	12. Fixed Income - SSA	A		B
<10%	13. Fixed Income - Corporate Financial	A		B
<10%	14. Fixed Income - Corporate Non-Financial	A		B
10-50%	15. Fixed Income - Securitised	A		B