

# Calvert Survey Finds Strong Demand for Responsible Investing in Defined Contribution Plans



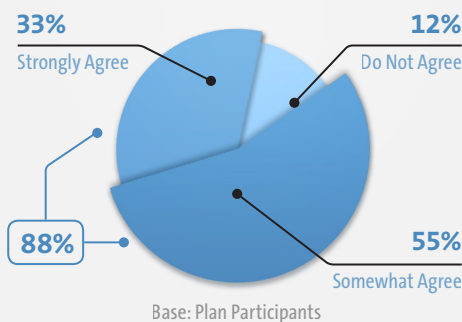
## KEY TAKEAWAYS

- The vast majority of plan participants, particularly Millennials, find the concept of Responsible Investing to be appealing.
- Plan participants overwhelmingly say they would invest in Responsible Investing mutual funds if offered in their plan.
- More than half of eligible non-participants would be more likely to enroll in the plan if it included Responsible Investing fund choices.
- Plan participants who believe their plan currently offers Responsible Investing choices express greater satisfaction with their plan and stronger loyalty to their employer.

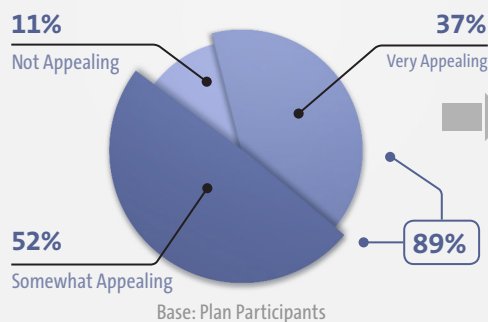
## STRONG DEMAND AMONG DC PLAN PARTICIPANTS FOR RESPONSIBLE INVESTING OPTIONS

After reading a definition of Responsible Investing\*, plan participants express strong interest in having access to this investing strategy through their Workplace Retirement Plan.

### Nearly 9 in 10 Participants Want Investments to Align with Their Values



### Responsible Investing has a Broad Appeal

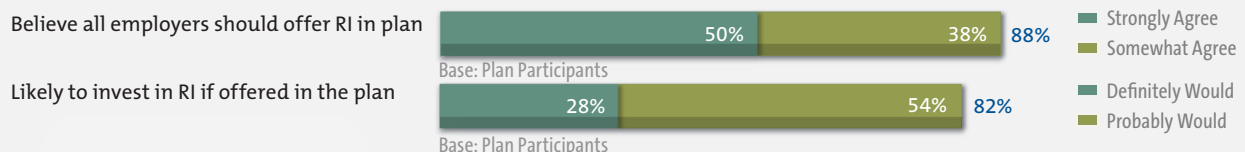


#### Millennials Most Enthusiastic About RI

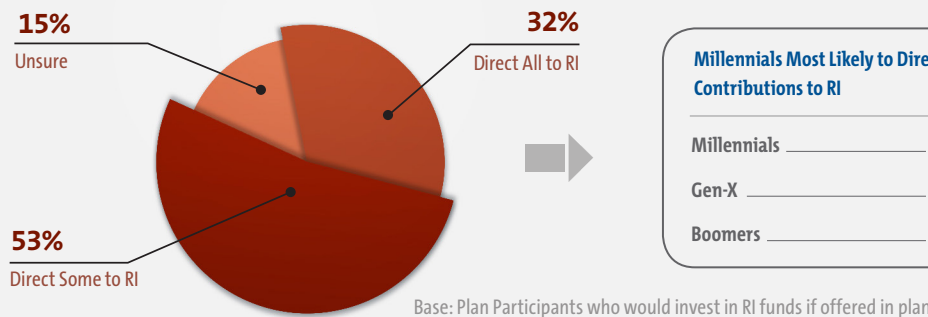
% find concept <b>very</b> appealing	
Millennials	43%
Gen-X	37%
Boomers	30%

*"Finally, people can use their money to activate change in the world and move towards solving the world's problems."*  
— Millennial

### Workplace Retirement Plans Seen as Natural Place to Access Responsible Investing (RI) Funds...



### ...With Many Participants Who Would Direct Some or All of Their Contributions to RI Funds if All Asset Classes Were Offered



#### Millennials Most Likely to Direct All Contributions to RI

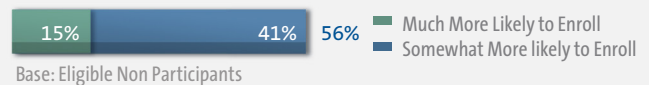
Millennials	46%
Gen-X	28%
Boomers	18%

*"It's a win-win situation for both corporations and investors; doing well by doing good."*  
— Gen-X

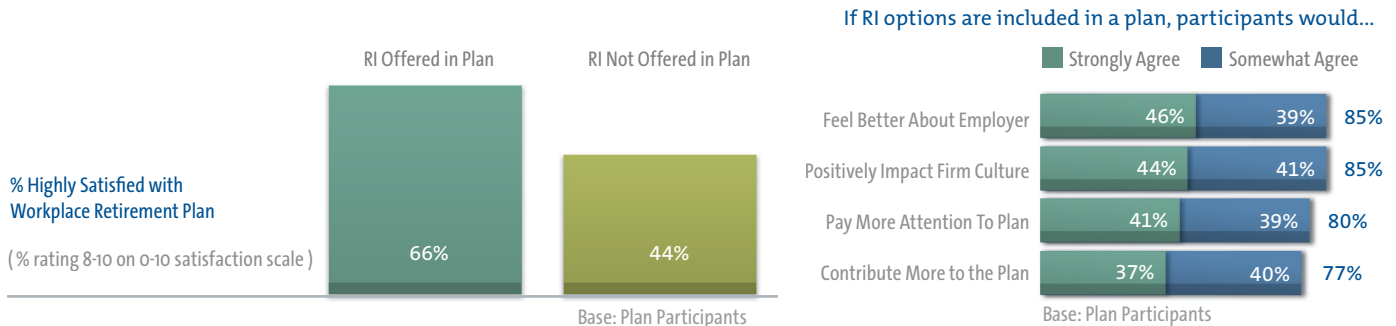
\***Responsible Investing (RI)** is an investment approach that seeks to generate superior risk-adjusted returns for investors and create a positive impact on society. To select companies to invest in, the investment manager evaluates not only each company's financial strength but also the company's performance in terms of environmental, social, and governance practices.

## AN OPPORTUNITY TO BOOST PLAN ENROLLMENT THROUGH RESPONSIBLE INVESTING

More than half of eligible non-participants say they would be more likely to enroll in the plan if Responsible Investing mutual funds were available.

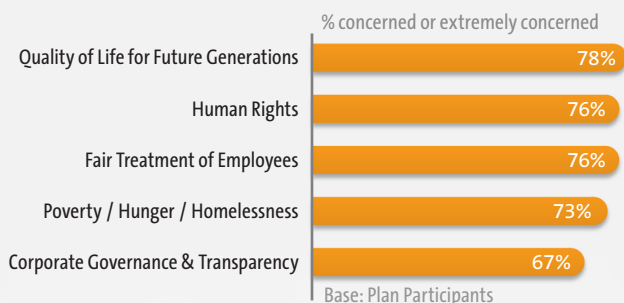


## PARTICIPANTS EXPRESS HIGHER SATISFACTION WITH A PLAN THAT OFFERS RI FUNDS



## RESPONSIBLE INVESTING ALIGNS WITH THE WAY PLAN PARTICIPANTS APPROACH THEIR LIVES

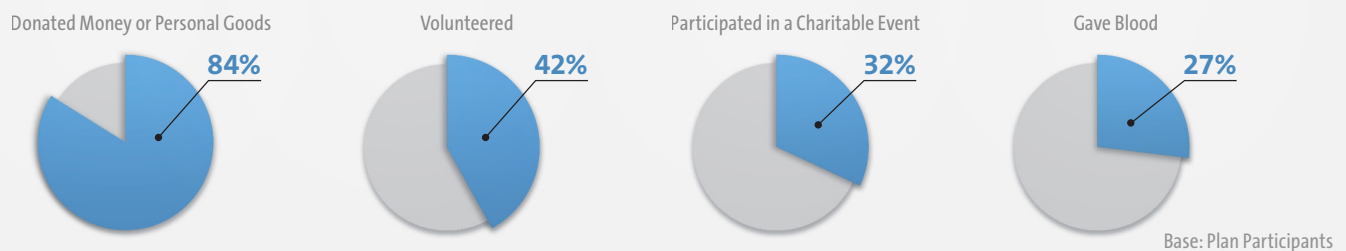
### Concerned About Issues Facing Society...



### ... And Want to be Part of the Solution



### Have Taken Action in Past 12 Months



### ABOUT CALVERT INVESTMENTS

Calvert Investments is the global leader in Responsible Investing. Our mission is to deliver superior long-term performance to our clients and enable them to achieve positive impact. Founded in 1976 and headquartered in Bethesda, Maryland, Calvert Investments had more than \$12.6 billion in assets under management as of August 31, 2015. Learn more at [www.Calvert.com](http://www.Calvert.com).

Calvert Investments is a registered trade name representing Calvert Investments, Inc. and its subsidiaries, including Calvert Investment Management, Inc., an SEC-registered investment advisor, and Calvert Investments Distributors, Inc., a FINRA member broker/dealer and distributor of the Calvert mutual funds.

### ABOUT THE STUDY

The Calvert Investments study is based on surveys of 1,231 defined contribution retirement plan participants, including 401(k), 403(b) or 457 plan participants, and 295 eligible non-participants between July 29 and August 10, 2015 conducted by market research firm 8 Acre Perspective. Results have a margin of error of +/-3% for plan participants and +/-6% for eligible non-participants.

Investment in mutual funds involves risk, including possible loss of principal invested.

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