

# CVMC

## Calvert US Mid-Cap Core Responsible Index ETF Analyst Report

CVMC tracks a market-cap-weighted, ESG-screened index of US mid-cap stocks.

### ESG Themes and Scores

6.77/10

ESG Rate

59.18%

Global Percentile

91.55%

Peer Percentile

### Performance Data

	CVMC	ETF Database Category Average	Factset Segment Average
1 Month	3.69%	2.33%	0.37%
3 Month	12.70%	8.00%	1.27%
YTD Return	15.11%	11.12%	1.51%
1 Year Return	24.84%	22.13%	2.48%
3 Year Return	15.99%	14.14%	1.60%
5 Year Return	N/A	6.20%	0.00%

### Top 5 Holdings

Symbol	Holding	% Assets
Other	U.S. Dollar	1.94%
SNDK	Sandisk Corporation	1.81%
MRVL	Marvell Technology, Inc.	1.79%
STX	Seagate Technology Holdings PLC	1.41%
WDC	Western Digital Corporation	1.30%

### Vitals

Issuer	Morgan Stanley
Brand	Calvert
Structure	ETF
Expense Ratio	0.15%
Inception	Jan 30, 2023
Index Tracked	Russell Midcap Index

### ETF Database Themes

Category	Mid Cap Blend Equities
Asset Class	Equity
Asset Class Size	Mid-Cap
Asset Class Style	Blend
Region (General)	North America
Region (Specific)	U.S.

### FactSet Classifications

Segment	Equity: U.S. - Mid Cap
Category	Size and Style
Focus	Mid Cap
Niche	Broad-based
Strategy	ESG
Weighting	Market Cap

