

The Calamos Investments UNPRI Leadership Statement 2025

Calamos Investments, as a firm, believes that a focus on sustainability in a variety of forms is a critical part of the investment process and a quality business practice. Sustainable investing is more than the consideration of environmental, social, and governance factors; it is a broad-focused lens that shows a clear and distinct picture. Investment teams at Calamos view sustainability as more than just a consideration; it is viewed as a lasting indicator of positive impact, and consequently, of success.

Our mission at Calamos is to provide clients with unique investment vehicles that meet their needs and deliver strong risk-adjusted, long-term performance. We seek to employ disciplined investment processes that uncover opportunities and evaluate potential risks while striving for the best possible return outcomes within our investment guidelines. We invest in a broad array of asset classes including global equities, hybrid securities, fixed income, multi-asset, and liquid alternative strategies through a variety of closed and open end mutual funds, interval funds, ETFs, and structured protection offerings.

At Calamos, sustainable investing isn't just about the products put forth; it is about the peoplepower and conviction behind the actions of the firm. People across all departments participate in three Calamos Working Groups that focus on sustainability and corporate responsibility. These groups report to the Calamos Sustainability Advisory Council, which is comprised of the firm's senior leaders. The Council concentrates on evolving Calamos' sustainability and corporate responsibility targets to stay ahead of the expectations of the marketplace. As a result, Calamos serves the needs of investors and makes a positive impact with the decisions made along the way.

Since Calamos Investments became a UNPRI signatory in 2018, the firm continually develops its definition of sustainability. At Calamos, a "team of teams" approach to sustainable investing is encouraged. Investment teams decide how to integrate sustainable factors and then set out their plan in a clearly defined procedure, specific to each team. Still, Calamos' core sustainability funds (the Calamos Antetokounmpo Sustainable Equities Funds) remain dedicated and focused on sustainable targets. The investment team for these sustainable funds is fully engaged in ESG-focused research and engagement. The team has been dedicated to sustainable investing since the 1990s. Their knowledge and proprietary research around sustainable investments is extensive. With their 33 years of sustainable investing experience and Calamos' 48 years of industry experience, Calamos is able to provide a well-rounded but distinct sustainable portfolio.

Calamos Investments believes that the United Nations Principles of Responsible Investing serve as a vital guide to the future of investing. With Calamos' long history of innovation in investing and providing diverse products, it is important to the firm to remain at the forefront of sustainability. Calamos strives to continue evolving to meet the aspirations of its clients and the needs of the world.

John S. Koudounis
President & CEO
Calamos Investments