



The goal of the Hutchinson Community Foundation Finance Committee is to take a diversified approach with long-term goals for growth and income. Each Investment Pool available provides a diversified approach for the market sector reflected. Investment Pool performances are before Hutch CF administrative fees.

**Invest for More Strategy Performance:**

Adopted 12-1-2021. This strategy is designed to provide both a financial and social return. The strategy is allocated as 70% Equity Pool, 25% Bond Pool and 5% Impact Investment Pool. The Finance Committee may adjust the equity and bond allocations; however, the local investments will remain at 5%.

	<u>YTD</u>	<u>1-Year</u>	<u>3-Year</u>	<u>5-Year</u>	<u>10-Year</u>
Invest for More Strategy	-5.01%	n/a	n/a	n/a	n/a

**Equity Pool Performance:**

Invests in large equity funds providing exposure to growth, value and small capitalization companies as well as a very limited allocation to non U.S. funds. As with any equity investing, some volatility is expected.

	<u>YTD</u>	<u>1-Year</u>	<u>3-Year</u>	<u>5-Year</u>	<u>10-Year</u>
Hutch CF Equity Pool	-5.26%	9.97%	14.94%	12.49%	11.43%
MSCI All Cap World Index (MSCI ACWI)	-5.36%	7.28%	13.75%	11.64%	10.00%
S&P 500 Index	-4.60%	15.65%	18.92%	15.99%	14.64%

**Bond Pool Performance:**

Provides funds with lower volatility than the equity pool. These assets are primarily invested in a broad range of fixed income securities managed by leading mutual funds.

	<u>YTD</u>	<u>1-Year</u>	<u>3-Year</u>	<u>5-Year</u>	<u>10-Year</u>
Hutch CF Bond Pool	-5.22%	-2.65%	1.64%	2.50%	3.17%
Barclays Capital US Aggregate Index	-5.93%	-4.15%	1.69%	2.14%	2.24%

**Interest Pool Performance:**

Provides funds with minimal volatility. These assets are primarily invested in high quality short-term fixed income securities with an average maturity of less than 180 days.

	<u>YTD</u>	<u>1-Year</u>	<u>3-Year</u>	<u>5-Year</u>	<u>10-Year</u>
Hutch CF Interest Pool	0.16%	0.53%	0.76%	0.94%	0.66%
US Gov't Money Market Funds Average	0.00%	0.02%	0.47%	0.68%	0.34%

Information Available Upon Request – Full copies of the investment policy, current investment pool allocations, spending policy, outside management policy, Form 990, Form 990-T if one is filed, and audited financial statements are available upon request from our office.

Find detailed information about our investments at "How We Invest" on our website: <https://hutchcf.org/about-us/how-we-invest>.

**Finance Committee: Dave Kerr, Chair • Lisa French • Mike Juby  
David Neal • Bill Southern • Ken Vogel**