



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	-17.45%	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	-20.94%	-14.67%	6.90%	7.71%	9.97%
MSCI All Cap World Index (MSCI ACWI)	-20.18%	-15.75%	6.21%	7.00%	8.76%
S&P 500 Index	-19.96%	-10.62%	10.60%	11.31%	12.96%

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	-10.27%	-9.84%	-1.13%	0.93%	2.38%
Barclays Capital US Aggregate Index	-10.35%	-10.30%	-0.93%	0.88%	1.54%

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	0.32%	0.59%	0.65%	0.93%	0.68%
US Gov't Money Market Funds Average	0.08%	0.09%	0.35%	0.68%	0.35%

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 yield information about our investments on the "How We Invest" page at hutchcf.org.

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