



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	-16.08%	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	-18.81%	-18.81%	4.88%	6.16%	9.38%
MSCI All Cap World Index (MSCI ACWI)	-18.36%	-18.36%	4.00%	5.23%	7.98%
S&P 500 Index	-18.11%	-18.11%	7.66%	9.43%	12.56%

**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	-11.03%	-11.03%	-2.24%	0.27%	1.78%
Barclays Capital US Aggregate Index	-13.01%	-13.01%	-2.71%	0.02%	1.06%

**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	0.99%	0.99%	0.63%	0.99%	0.74%
US Gov't Money Market Funds Average	1.25%	1.25%	0.50%	0.87%	0.47%

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](http://hutchcf.org).

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