

Investment Performance Summary

December 31, 2018

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 administrative fees.

Balanced Pool: provides funds with moderate volatility. The assets are primarily invested 60% (+/- 10%) in the Equity Pool and 40% (+/- 10%) in the Bond Pool. The current investment ratio is 60% Equities/40% Bonds

Performance	YTD	Annualized			
		1-Year	3-Year	5-Year	10-Year
Balanced Pool	-4.79%	-4.79%	6.86%	5.07%	9.25%
<i>60% S&P Index & 40% Bond Index</i>	-2.63%	-2.63%	6.38%	6.10%	9.26%

Equity Pool: provides funds with a more aggressive opportunity for growth and income, and high volatility. These assets are invested in approximately 51% large cap U.S. equities, 15% large cap value, 11% small cap U.S. equities, and 23% foreign equities.

Performance	YTD	Annualized			
		1-Year	3-Year	5-Year	10-Year
Equity Pool	-7.88%	-7.88%	8.46%	5.72%	10.64%
<i>S&P 500 Index</i>	-4.38%	-4.38%	9.26%	8.49%	13.12%

Bond Pool: 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.

Performance	YTD	Annualized			
		1-Year	3-Year	5-Year	10-Year
Bond Pool	-0.51%	-0.51%	3.81%	3.82%	5.82%
<i>Barclays Capital US Aggregate Index</i>	0.01%	0.01%	2.06%	2.52%	3.48%

Interest Pool: 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.

Performance	YTD	Annualized			
		1-Year	3-Year	5-Year	10-Year
Interest Pool	1.35%	1.35%	1.08%	0.69%	0.42%
<i>US Gov't Money Market Funds Average</i>	1.23%	1.23%	0.53%	0.32%	0.17%

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.

Finance Committee: Ken Vogel, Chair • Susan Buttram • Mike Juby
Dave Kerr • Rich Manka • David Neal • Bill Southern