

Investment Performance Summary

June 30, 2019

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	12.73%	7.53%	6.37%	6.38%	9.77%
<i>60% MSCI Index & 40% Bond Index</i>	12.18%	6.59%	7.89%	4.88%	7.65%
<i>60% S&P Index & 40% Bond Index</i>	13.56%	9.40%	9.43%	7.61%	10.38%

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	16.93%	7.05%	8.56%	7.70%	11.73%
<i>MSCI All Cap World Index</i>	16.23%	5.74%	11.62%	6.16%	10.15%
<i>S&P 500 Index</i>	18.54%	10.42%	14.19%	10.71%	14.70%

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	6.44%	7.57%	3.07%	4.24%	5.68%
<i>Barclays Capital US Aggregate Index</i>	6.11%	7.87%	2.31%	2.95%	3.90%

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	0.96%	1.72%	1.30%	0.86%	0.50%
<i>US Gov't Money Market Funds Average</i>	0.90%	1.65%	0.83%	0.50%	0.25%

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 • Kim Moore • David Neal • Bill Southern