

Investment Performance Summary

December 31, 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	19.74%	19.74%	6.91%	7.29%	8.66%
<i>60% MSCI Index & 40% Bond Index</i>	19.87%	19.87%	9.44%	6.62%	7.12%
<i>60% S&P Index & 40% Bond Index</i>	22.38%	22.38%	10.77%	8.24%	9.64%

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, 17% large cap value, 11% small cap U.S. equities, and 21% foreign equities.

Performance	YTD	Annualized			
		1-Year	3-Year	5-Year	10-Year
Equity Pool	26.89%	26.89%	9.11%	9.02%	10.34%
<i>MSCI All Cap World Index</i>	27.30%	27.30%	13.05%	9.00%	9.37%
<i>S&P 500 Index</i>	31.49%	31.49%	15.27%	11.70%	13.56%

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	9.08%	9.08%	3.54%	4.52%	4.99%
<i>Barclays Capital US Aggregate Index</i>	8.72%	8.72%	4.03%	3.05%	3.75%

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	1.69%	1.69%	1.44%	0.98%	0.57%
<i>US Gov't Money Market Funds Average</i>	1.61%	1.61%	1.06%	0.64%	0.32%

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 • Lisa French • Mike Juby
Dave Kerr • Kim Moore • David Neal • Bill Southern