

Investment Performance Summary

March 31, 2021

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	2.51%	34.86%	9.68%	10.17%	8.35%
<i>60% MSCI Index & 40% Bond Index</i>	1.39%	33.04%	9.10%	9.17%	6.86%
<i>60% S&P Index & 40% Bond Index</i>	2.35%	34.09%	11.93%	11.01%	9.73%

Equity Pool: provides funds with a more aggressive opportunity for growth and income, and high volatility. These assets are invested in approximately 47% large cap U.S. equities, 20% large cap value, 10% small cap U.S. equities, 13% Nasdaq 100 Index and 10% foreign equities.

Performance	YTD	Annualized			
		1-Year	3-Year	5-Year	10-Year
Equity Pool	6.42%	56.93%	13.05%	13.81%	10.61%
<i>MSCI All Cap World Index</i>	4.57%	54.60%	12.07%	13.21%	9.14%
<i>S&P 500 Index</i>	6.17%	56.35%	16.78%	16.29%	13.91%

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	-3.08%	5.09%	3.82%	4.24%	4.10%
<i>Barclays Capital US Aggregate Index</i>	-3.37%	0.71%	4.65%	3.10%	3.44%

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	0.05%	0.29%	1.12%	0.96%	0.62%
<i>US Gov't Money Market Funds Average</i>	0.00%	0.02%	0.96%	0.69%	0.34%

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**