

Portfolio Investment Summary

Combined Endowment

Important Information



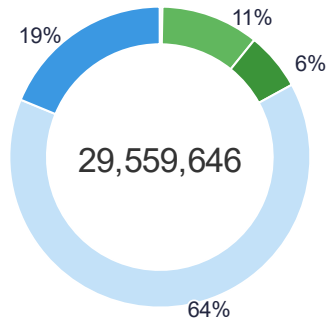
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Q1 2024 Investment Summary – Combined Endowment



As of Mar 31, 2024 | Performance Inception Oct 29, 2021



	Asset Allocation		Performance		
	Value	Percent	MTD	QTD	YTD
Deposits & Money Market Funds	82,821	0.3%	0.44%	1.25%	1.25%
Investment Grade Fixed Income	3,109,740	10.5%	0.83%	-0.08%	-0.08%
Other Fixed Income	1,841,015	6.2%	0.18%	0.47%	0.47%
US Equity	18,976,526	64.2%	2.76%	9.34%	9.34%
Non-US Equity	5,549,544	18.8%	3.13%	5.34%	5.34%
Total Investment Strategies	\$29,559,646	100.0%	2.43%	6.93%	6.93%

Investment Results	QTD
Beginning Investment	\$27,328,197
Net Deposit & Withdrawals	\$320,556
Investment Results	\$1,910,894
Ending Investment	\$29,559,646

Benchmark Performance	Performance		
	MTD	QTD	YTD
Bloomberg Barclays Capital US Intermediate Government/Credit TR Index in USD	0.64%	-0.15%	-0.15%
S&P 500 TR Index in USD	3.22%	10.56%	10.56%
MSCI EAFE Unhedged Currency TR Index in USD	3.40%	5.93%	5.93%

Performance is net of fees. For the purposes of this analysis, the Combined Endowment cash account (\$876k) has been excluded.

Additional Important Information

As of Mar 31, 2024 (USD)



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Additional Important Information

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Additional Important Information



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Additional Important Information



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As of Mar 31, 2024 (USD)

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