

# FOUNDATION FOR THE CHARLOTTE JEWISH COMMUNITY



Preliminary Investment Performance  
March 31, 2024 \*

	Performance					
	QTD	CYTD	1 Year	3 Year	5 Year	10 Year
<b>Liquid Reserves</b>	<b>1.3</b>	<b>1.3</b>	<b>5.5</b>	<b>2.7</b>	<b>2.0</b>	<b>1.5</b>
<i>90 Day Tbill</i>	1.3	1.3	5.2	2.6	2.0	1.4
<b>Low Duration Fixed Income</b>	<b>0.5</b>	<b>0.5</b>	<b>4.0</b>	<b>0.4</b>	<b>1.3</b>	<b>-</b>
<i>ICE BofAML 1-3 Yr. Gov/Corp</i>	0.5	0.5	3.5	0.2	1.4	-
<b>Income &amp; Growth</b>	<b>3.4</b>	<b>3.4</b>	<b>10.8</b>	<b>1.9</b>	<b>4.7</b>	<b>5.7</b>
<i>Target Weighted Index</i>	2.9	2.9	10.3	1.9	4.9	5.3
<b>Passive Long-Term Growth</b>	<b>5.1</b>	<b>5.1</b>	<b>15.7</b>	<b>4.0</b>	<b>7.4</b>	<b>-</b>
<i>Target Weighted Index</i>	5.2	5.2	15.9	4.2	7.6	-
<b>Active Long-Term Growth</b>	<b>5.9</b>	<b>5.9</b>	<b>16.4</b>	<b>4.1</b>	<b>7.7</b>	<b>6.5</b>
<i>Target Weighted Index</i>	5.3	5.3	16.4	4.3	8.0	7.3
<b>Diversified Long-Term Growth</b>	<b>5.0</b>	<b>5.0</b>	<b>13.1</b>	<b>4.0</b>	<b>7.3</b>	<b>6.1</b>
<i>Target Weighted Index</i>	4.5	4.5	13.2	4.5	8.2	6.7

\* Investment returns are preliminary and subject to adjustments including more current reporting from investment managers. For any inquires, please contact us at [investments@fftc.org](mailto:investments@fftc.org).