

# FOUNDATION FOR THE CHARLOTTE JEWISH COMMUNITY



Preliminary Investment Performance  
September 30, 2024 \*

	Performance					
	QTD	CYTD	1 Year	3 Year	5 Year	10 Year
<b>Liquid Reserves</b>	<b>1.3</b>	<b>3.9</b>	<b>5.4</b>	<b>3.6</b>	<b>2.3</b>	<b>1.7</b>
<i>90 Day Tbill</i>	1.4	4.0	5.5	3.5	2.3	1.7
<b>Low Duration Fixed Income</b>	<b>2.8</b>	<b>4.2</b>	<b>7.0</b>	<b>1.6</b>	<b>1.7</b>	<b>-</b>
<i>ICE BofAML 1-3 Yr. Gov/Corp</i>	3.0	4.4	7.2	1.5	1.7	-
<b>Income &amp; Growth</b>	<b>5.2</b>	<b>9.8</b>	<b>18.0</b>	<b>2.8</b>	<b>5.2</b>	<b>6.1</b>
<i>Target Weighted Index</i>	5.4	9.7	18.2	3.0	5.4	5.6
<b>Passive Long-Term Growth</b>	<b>6.4</b>	<b>13.5</b>	<b>24.8</b>	<b>5.1</b>	<b>8.2</b>	<b>-</b>
<i>Target Weighted Index</i>	6.4	13.6	25.1	5.3	8.4	-
<b>Active Long-Term Growth</b>	<b>6.0</b>	<b>13.6</b>	<b>24.1</b>	<b>5.0</b>	<b>8.4</b>	<b>6.9</b>
<i>Target Weighted Index</i>	6.4	13.9	25.4	5.4	8.8	7.8
<b>Diversified Long-Term Growth</b>	<b>5.2</b>	<b>11.1</b>	<b>18.7</b>	<b>4.2</b>	<b>7.9</b>	<b>6.3</b>
<i>Target Weighted Index</i>	5.0	11.0	19.7	4.8	8.7	7.1

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