

# FOUNDATION FOR THE CAROLINAS

Preliminary Investment Performance  
March 31, 2023\*



	QTD	CYTD	1 Year	3 Year	5 Year	10 Year	SI
<b>Liquid Reserves</b>	<b>1.1</b>	<b>1.1</b>	<b>2.8</b>	<b>0.9</b>	<b>1.3</b>	<b>1.0</b>	<b>1.5</b>
90 Day T-Bill	1.1	1.1	2.5	0.9	1.4	0.9	1.4
<b>Low Duration Fixed Income</b>	<b>1.2</b>	<b>1.2</b>	<b>0.1</b>	<b>0.9</b>	<b>1.1</b>	<b>na</b>	<b>1.2</b>
ICE BofAML 1-3 Yr. Gov/Corp	1.5	1.5	0.2	-0.4	1.3	na	1.1
<b>Income &amp; Growth</b>	<b>3.9</b>	<b>3.9</b>	<b>-4.7</b>	<b>5.9</b>	<b>3.4</b>	<b>5.4</b>	<b>6.5</b>
Target Weighted Index	4.4	4.4	-3.9	4.9	3.7	4.8	5.7
<b>Passive Long-Term Growth</b>	<b>5.6</b>	<b>5.6</b>	<b>-6.1</b>	<b>10.5</b>	<b>5.3</b>	<b>na</b>	<b>6.9</b>
Target Weighted Index	5.6	5.6	-5.9	10.6	5.3	na	6.9
<b>Active Long-Term Growth</b>	<b>5.1</b>	<b>5.1</b>	<b>-6.1</b>	<b>11.1</b>	<b>5.0</b>	<b>6.3</b>	<b>6.1</b>
Target Weighted Index	5.8	5.8	-5.9	10.6	5.8	6.9	5.7
<b>ESG Long-Term Growth</b>	<b>7.3</b>	<b>7.3</b>	<b>-5.6</b>	<b>na</b>	<b>na</b>	<b>na</b>	<b>-9.1</b>
Target Weighted Index	6.1	6.1	-5.3	na	na	na	-7.2
<b>Diversified Long-Term Growth</b>	<b>3.8</b>	<b>3.8</b>	<b>-3.4</b>	<b>10.9</b>	<b>5.5</b>	<b>6.2</b>	<b>5.7</b>
Target Weighted Index	4.2	4.2	-3.5	11.1	6.4	6.6	5.2

\* 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).