

# FOUNDATION FOR THE CHARLOTTE Jewish Community



Preliminary Investment Performance  
February 28, 2023 \*

	Performance					
	QTD	CYTD	1 Year	3 Year	5 Year	10 Year
<b>Liquid Reserves</b>	<b>0.7</b>	<b>0.7</b>	<b>2.4</b>	<b>0.8</b>	<b>1.3</b>	<b>1.0</b>
<i>90 Day Tbill</i>	0.6	0.6	2.1	0.8	1.4	0.8
<b>Low Duration Fixed Income</b>	<b>0.2</b>	<b>0.2</b>	<b>-2.0</b>	<b>-0.6</b>	<b>0.9</b>	<b>-</b>
<i>ICE BofAML 1-3 Yr. Gov/Corp</i>	0.1	0.1	-2.6	-0.7	1.0	-
<b>Income &amp; Growth</b>	<b>2.1</b>	<b>2.1</b>	<b>-6.8</b>	<b>2.1</b>	<b>3.0</b>	<b>5.4</b>
<i>Target Weighted Index</i>	2.0	2.0	-6.9	2.1	3.2	4.7
<b>Passive Long-Term Growth</b>	<b>3.4</b>	<b>3.4</b>	<b>-7.3</b>	<b>5.5</b>	<b>4.6</b>	<b>-</b>
<i>Target Weighted Index</i>	3.3	3.3	-7.2	5.6	4.7	-
<b>Active Long-Term Growth</b>	<b>3.2</b>	<b>3.2</b>	<b>-7.1</b>	<b>5.6</b>	<b>4.4</b>	<b>6.3</b>
<i>Target Weighted Index</i>	3.2	3.2	-7.5	5.7	5.0	6.9
<b>Diversified Long-Term Growth</b>	<b>2.5</b>	<b>2.5</b>	<b>-5.0</b>	<b>6.6</b>	<b>4.8</b>	<b>6.1</b>
<i>Target Weighted Index</i>	2.6	2.6	-4.9	7.0	5.8	6.6

\* 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).