

# FOUNDATION FOR THE CAROLINAS

Preliminary Investment Performance  
 April 30, 2023



	QTD	CYTD	1 Year	3 Year	5 Year	10 Year	SI
<b>Liquid Reserves</b>	<b>0.4</b>	<b>1.5</b>	<b>3.2</b>	<b>1.0</b>	<b>1.4</b>	<b>1.0</b>	<b>1.5</b>
90 Day T-Bill	0.3	1.4	2.8	1.0	1.4	0.9	1.4
<b>Low Duration Fixed Income</b>	<b>0.4</b>	<b>1.6</b>	<b>1.2</b>	<b>0.5</b>	<b>1.1</b>	<b>na</b>	<b>1.3</b>
ICE BofAML 1-3 Yr. Gov/Corp	0.3	1.8	1.1	-0.5	1.4	na	1.1
<b>Income &amp; Growth</b>	<b>0.8</b>	<b>4.8</b>	<b>0.8</b>	<b>4.2</b>	<b>3.6</b>	<b>5.3</b>	<b>6.6</b>
Target Weighted Index	0.9	5.3	1.7	3.5	3.9	4.7	5.7
<b>Passive Long-Term Growth</b>	<b>1.1</b>	<b>6.8</b>	<b>1.6</b>	<b>8.2</b>	<b>5.4</b>	<b>na</b>	<b>7.0</b>
Target Weighted Index	1.1	6.7	1.8	8.3	5.3	na	6.9
<b>Active Long-Term Growth</b>	<b>1.1</b>	<b>6.2</b>	<b>1.1</b>	<b>8.5</b>	<b>5.2</b>	<b>6.3</b>	<b>6.1</b>
Target Weighted Index	1.2	7.0	1.8	8.2	6.0	6.9	5.7
<b>ESG Long-Term Growth</b>	<b>1.3</b>	<b>8.6</b>	<b>2.6</b>	<b>na</b>	<b>na</b>	<b>na</b>	<b>-7.9</b>
Target Weighted Index	1.2	7.3	2.6	na	na	na	-6.1
<b>Diversified Long-Term Growth</b>	<b>0.7</b>	<b>4.5</b>	<b>0.9</b>	<b>9.9</b>	<b>5.5</b>	<b>6.1</b>	<b>5.7</b>
Target Weighted Index	0.9	5.1	1.6	9.8	6.4	6.6	5.2

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