

FOUNDATION FOR THE CHARLOTTE JEWISH COMMUNITY



Preliminary Investment Performance

November 30, 2024 *

	Performance					
	QTD	CYTD	1 Year	3 Year	5 Year	10 Year
Liquid Reserves	0.8	4.8	5.2	3.9	2.4	1.8
90 Day Tbill	0.8	4.8	5.3	3.8	2.4	1.7
Low Duration Fixed Income	-0.1	4.2	5.4	1.7	1.6	-
ICE BofAML 1-3 Yr. Gov/Corp	-0.2	4.2	5.4	1.5	1.6	-
Income & Growth	-0.0	9.8	13.9	2.7	4.7	5.8
Target Weighted Index	-0.3	9.4	13.6	2.7	4.9	5.3
Passive Long-Term Growth	0.4	13.9	19.8	4.9	7.6	-
Target Weighted Index	0.3	14.0	19.8	5.0	7.7	-
Active Long-Term Growth	0.6	14.3	19.4	5.0	7.7	6.7
Target Weighted Index	0.4	14.4	19.9	5.1	8.1	7.6
Diversified Long-Term Growth	1.1	12.3	16.0	4.4	7.4	6.3
Target Weighted Index	1.0	12.1	16.8	4.7	8.1	7.1

* 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.