

# FOUNDATION FOR THE CAROLINAS



Preliminary Investment Performance  
November 30, 2024 \*

	QTD	CYTD	1 Year	3 Year	5 Year	10 Year	SI
<b>Liquid Reserves</b>	<b>0.8</b>	<b>4.8</b>	<b>5.3</b>	<b>3.8</b>	<b>2.4</b>	<b>1.8</b>	<b>1.8</b>
90 Day T-Bill	0.8	4.8	5.3	3.8	2.4	1.7	1.6
<b>Low Duration Fixed Income</b>	<b>-0.1</b>	<b>4.2</b>	<b>5.4</b>	<b>1.7</b>	<b>1.5</b>	<b>na</b>	<b>1.8</b>
ICE BofAML 1-3 Yr. Gov/Corp	-0.2	4.2	5.4	1.5	1.6	na	1.6
<b>Income &amp; Growth</b>	<b>0.0</b>	<b>9.8</b>	<b>13.8</b>	<b>2.6</b>	<b>4.7</b>	<b>5.8</b>	<b>6.8</b>
Target Weighted Index	-0.3	9.4	13.6	2.7	4.9	5.3	6.0
<b>Passive Long-Term Growth</b>	<b>0.4</b>	<b>13.9</b>	<b>19.8</b>	<b>4.9</b>	<b>7.8</b>	<b>na</b>	<b>8.4</b>
Target Weighted Index	0.3	14.0	19.8	5.0	7.7	na	8.4
<b>Active Long-Term Growth</b>	<b>0.7</b>	<b>14.3</b>	<b>19.4</b>	<b>5.0</b>	<b>7.7</b>	<b>6.8</b>	<b>6.6</b>
Target Weighted Index	0.4	14.4	19.9	5.1	8.1	7.6	6.3
<b>ESG Long-Term Growth</b>	<b>0.2</b>	<b>13.4</b>	<b>18.6</b>	<b>3.6</b>	<b>na</b>	<b>na</b>	<b>2.7</b>
Target Weighted Index	0.3	14.8	20.3	5.3	na	na	4.4
<b>Diversified Long-Term Growth</b>	<b>1.1</b>	<b>11.6</b>	<b>14.8</b>	<b>4.1</b>	<b>7.4</b>	<b>6.3</b>	<b>6.0</b>
Target Weighted Index	0.9	11.7	15.4	4.6	7.9	7.0	5.6

\* 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).