

FOUNDATION FOR THE CAROLINAS



Preliminary Investment Performance
December 31, 2024 *

	QTD	CYTD	1 Year	3 Year	5 Year	10 Year	SI
Liquid Reserves	1.2	5.2	5.2	4.0	2.4	1.8	1.8
90 Day T-Bill	1.2	5.3	5.3	3.9	2.5	1.8	1.7
Low Duration Fixed Income	0.2	4.4	4.4	1.8	1.5	na	1.8
ICE BofAML 1-3 Yr. Gov/Corp	0.0	4.5	4.5	1.7	1.6	na	1.7
Income & Growth	-1.7	7.9	7.9	1.5	4.0	5.6	6.7
Target Weighted Index	-1.9	7.7	7.7	1.7	4.2	5.1	5.9
Passive Long-Term Growth	-2.1	11.1	11.1	2.9	6.7	na	8.0
Target Weighted Index	-2.1	11.2	11.2	3.0	6.7	na	8.0
Active Long-Term Growth	-1.7	11.6	11.6	3.0	6.7	6.6	6.5
Target Weighted Index	-1.9	11.7	11.7	3.2	7.0	7.4	6.2
ESG Long-Term Growth	-2.1	10.9	10.9	1.9	na	na	1.9
Target Weighted Index	-2.0	12.2	12.2	3.5	na	na	3.6
Diversified Long-Term Growth	-0.2	10.3	10.3	2.9	6.6	6.3	6.0
Target Weighted Index	-0.6	10.1	10.1	3.2	7.1	7.0	5.5

* 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.