

# FOUNDATION FOR THE CHARLOTTE Jewish Community



Preliminary Investment Performance  
January 31, 2023 \*

	Performance					
	QTD	CYTD	1 Year	3 Year	5 Year	10 Year
<b>Liquid Reserves</b>	<b>0.36</b>	<b>0.36</b>	<b>2.03</b>	<b>0.72</b>	<b>1.25</b>	<b>0.94</b>
<i>90 Day Tbill</i>	0.31	0.31	1.78	0.78	1.30	0.80
<b>Low Duration Fixed Income</b>	<b>0.76</b>	<b>0.76</b>	<b>-1.96</b>	<b>-0.32</b>	<b>0.98</b>	<b>-</b>
<i>ICE BofAML 1-3 Yr. Gov/Corp</i>	0.78	0.78	-2.38	-0.25	1.14	-
<b>Income &amp; Growth</b>	<b>4.18</b>	<b>4.18</b>	<b>-6.52</b>	<b>1.68</b>	<b>2.96</b>	<b>5.71</b>
<i>Target Weighted Index</i>	4.37	4.37	-6.11	2.02	3.17	5.03
<b>Passive Long-Term Growth</b>	<b>6.32</b>	<b>6.32</b>	<b>-6.36</b>	<b>4.38</b>	<b>4.42</b>	<b>-</b>
<i>Target Weighted Index</i>	6.24	6.24	-6.27	4.50	4.41	-
<b>Active Long-Term Growth</b>	<b>5.70</b>	<b>5.70</b>	<b>-6.80</b>	<b>4.33</b>	<b>4.34</b>	<b>6.59</b>
<i>Target Weighted Index</i>	6.21	6.21	-6.62	4.65	4.93	7.26
<b>Diversified Long-Term Growth</b>	<b>4.49</b>	<b>4.49</b>	<b>-4.84</b>	<b>5.39</b>	<b>4.54</b>	<b>6.33</b>
<i>Target Weighted Index</i>	5.01	5.01	-4.07	6.19	5.72	6.86

\* 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).