

# FOUNDATION FOR THE CHARLOTTE JEWISH COMMUNITY



Preliminary Investment Performance  
March 31, 2025 \*

	Performance					
	QTD	CYTD	1 Year	3 Year	5 Year	10 Year
<b>Liquid Reserves</b>	<b>1.0</b>	<b>1.0</b>	<b>4.9</b>	<b>4.4</b>	<b>2.6</b>	<b>1.9</b>
<i>90 Day Tbill</i>	<i>1.0</i>	<i>1.0</i>	<i>4.7</i>	<i>4.4</i>	<i>2.7</i>	<i>1.9</i>
<b>Low Duration Fixed Income</b>	<b>1.5</b>	<b>1.5</b>	<b>5.4</b>	<b>3.1</b>	<b>2.4</b>	<b>-</b>
<i>ICE BofAML 1-3 Yr. Gov/Corp</i>	<i>1.6</i>	<i>1.6</i>	<i>5.6</i>	<i>3.1</i>	<i>1.6</i>	<i>-</i>
<b>Income &amp; Growth</b>	<b>1.3</b>	<b>1.3</b>	<b>5.8</b>	<b>3.8</b>	<b>6.9</b>	<b>5.6</b>
<i>Target Weighted Index</i>	<i>1.2</i>	<i>1.2</i>	<i>5.9</i>	<i>3.9</i>	<i>6.1</i>	<i>5.1</i>
<b>Passive Long-Term Growth</b>	<b>-0.1</b>	<b>-0.1</b>	<b>5.6</b>	<b>4.7</b>	<b>10.6</b>	<b>-</b>
<i>Target Weighted Index</i>	<i>-0.0</i>	<i>-0.0</i>	<i>5.8</i>	<i>4.9</i>	<i>10.6</i>	<i>-</i>
<b>Active Long-Term Growth</b>	<b>0.5</b>	<b>0.5</b>	<b>6.0</b>	<b>5.0</b>	<b>11.1</b>	<b>6.5</b>
<i>Target Weighted Index</i>	<i>0.2</i>	<i>0.2</i>	<i>6.2</i>	<i>5.2</i>	<i>10.8</i>	<i>7.3</i>
<b>Diversified Long-Term Growth</b>	<b>1.1</b>	<b>1.1</b>	<b>6.5</b>	<b>4.7</b>	<b>10.7</b>	<b>6.2</b>
<i>Target Weighted Index</i>	<i>0.6</i>	<i>0.6</i>	<i>6.2</i>	<i>4.7</i>	<i>10.6</i>	<i>6.9</i>

\* 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).