

FOUNDATION FOR THE CHARLOTTE JEWISH COMMUNITY



Preliminary Investment Performance
May 31, 2025 *

	Performance					
	QTD	CYTD	1 Year	3 Year	5 Year	10 Year
Liquid Reserves	0.7	1.8	4.7	4.6	2.7	2.0
90 Day Tbill	0.7	1.8	4.8	4.5	2.7	1.9
Low Duration Fixed Income	0.7	2.1	5.7	3.4	2.0	-
ICE BofAML 1-3 Yr. Gov/Corp	0.6	2.2	5.8	3.3	1.5	-
Income & Growth	2.5	3.8	8.6	6.2	5.7	5.8
Target Weighted Index	2.7	4.0	8.8	6.4	5.3	5.4
Passive Long-Term Growth	4.8	4.7	10.3	8.5	9.0	-
Target Weighted Index	4.7	4.7	10.6	8.7	9.3	-
Active Long-Term Growth	4.6	5.0	10.8	8.8	9.5	6.8
Target Weighted Index	4.9	5.1	11.3	9.2	9.5	7.6
Diversified Long-Term Growth	3.6	4.7	10.2	7.6	9.6	6.3
Target Weighted Index	3.8	4.4	9.9	7.7	9.7	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.