

# FOUNDATION FOR THE CHARLOTTE JEWISH COMMUNITY



Preliminary Investment Performance  
January 31, 2024 \*

	Performance					
	QTD	CYTD	1 Year	3 Year	5 Year	10 Year
<b>Liquid Reserves</b>	<b>0.4</b>	<b>0.4</b>	<b>5.3</b>	<b>2.4</b>	<b>1.9</b>	<b>1.4</b>
90 Day Tbill	0.4	0.4	5.1	2.3	1.9	1.3
<b>Low Duration Fixed Income</b>	<b>0.4</b>	<b>0.4</b>	<b>4.3</b>	<b>0.3</b>	<b>1.4</b>	<b>-</b>
ICE BofAML 1-3 Yr. Gov/Corp	0.4	0.4	4.3	0.2	1.5	-
<b>Income &amp; Growth</b>	<b>0.2</b>	<b>0.2</b>	<b>7.2</b>	<b>1.2</b>	<b>4.6</b>	<b>5.7</b>
Target Weighted Index	0.1	0.1	7.3	1.2	4.8	5.2
<b>Passive Long-Term Growth</b>	<b>-0.3</b>	<b>-0.3</b>	<b>9.0</b>	<b>3.3</b>	<b>7.0</b>	<b>-</b>
Target Weighted Index	-0.3	-0.3	9.2	3.5	7.1	-
<b>Active Long-Term Growth</b>	<b>0.1</b>	<b>0.1</b>	<b>9.4</b>	<b>3.5</b>	<b>7.1</b>	<b>6.3</b>
Target Weighted Index	-0.1	-0.1	10.0	3.6	7.6	7.2
<b>Diversified Long-Term Growth</b>	<b>0.0</b>	<b>0.0</b>	<b>6.9</b>	<b>3.6</b>	<b>6.9</b>	<b>5.9</b>
Target Weighted Index	-0.2	-0.2	7.2	4.2	7.9	6.6

\* 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).