



## 2018 Performance of NWCTCF Relative to Peers ( expressed as a percentage)

In addition to benchmarking the performance against market-driven indices, The NW CT Community Foundation also compares its performance against its community foundation peers nationally. From initial date of participation in the national survey, NWCTCF has consistently ranked highly among its peer group (\$100 million - \$250 million) as reflected in the chart below.

The chart represents the Community Foundation Fiscal and Administrator Officers Group independent national investment survey comprising more than \$27 billion in charitable assets of more than one hundred community foundations, for the period ended March 31st, 2018 as reported in May of 2018. All data is expressed as percentages, and annualized for periods of more than one year, and net of investment management fees.

YTD and Median Annualized Rates of Return					
	Q1 2018	1 Year	3 Years	5 Years	7 Years
n = # of survey participants	n=157	n=155	n=150	n=141	n=139
<b>NWCTCF- New Haven Pool</b>	<b>0.9</b>	<b>12.8</b>	<b>7.6</b>	<b>9.6</b>	<b>8.8</b>
<b>All Community Foundations</b>	<b>-0.6</b>	<b>10.5</b>	<b>6.1</b>	<b>6.9</b>	<b>6.5</b>
<b>Peer Data: \$100 Million to \$250 Million</b>	<b>-0.5</b>	<b>10.7</b>	<b>6.2</b>	<b>6.9</b>	<b>6.4</b>
<b>Ranked #2 for all community foundations reporting YTD</b>					
<b>Ranked #5 for all community foundations reporting 1 year AAR*</b>					
<b>Ranked #5 for all community foundations reporting 3 Year AAR</b>					
<b>Ranked #3 for all community foundations reporting 5 year and #6 for 7 year AAR</b>					
<i>* averaged annual return</i>					