



## 2020 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 \$22 billion in charitable assets of more than 140 community foundations representing over 180 investment pools, for the period ended June 30th 2020 as reported in July of 2020. All data is expressed as percentages, and annualized for periods of more than one year, and net of investment management fees.

<b>YTD and Median Annualized Rates of Return</b>						
	<b>2020 as of 06/30</b>	<b>1 Year</b>	<b>3 Years</b>	<b>5 Years</b>	<b>7 Years</b>	<b>10 Years</b>
<b>n = # of survey participants</b>	<b>n=187</b>	<b>n=179</b>	<b>n=154</b>	<b>n=142</b>	<b>n=133</b>	<b>n=128</b>
<b>NWCTCF- New Haven Pool</b>	<b>-2.3</b>	<b>3.9</b>	<b>5.3</b>	<b>5.6</b>	<b>7.7</b>	<b>8.6</b>
<b>All Community Foundations</b>	<b>-5.2</b>	<b>0.8</b>	<b>4.3</b>	<b>4.7</b>	<b>5.8</b>	<b>7.2</b>
<b>Peer Data: \$100 Million to \$250 Million</b>	<b>-5.3</b>	<b>0.5</b>	<b>4.6</b>	<b>4.7</b>	<b>5.8</b>	<b>7.2</b>
<b>Ranked #43 for all community foundations reporting YTD*</b>						
<b>Ranked #45 for all community foundations reporting 1YR*</b>						
<b>Ranked #43 for all community foundations reporting 3 Year AAR</b>						
<b>Ranked #31 for all community foundations reporting 5 year AAR</b>						
<b>Ranked #11 for all community foundations reporting 7 year AAR</b>						
<b>Ranked #15 for all community foundations reporting 10 year AAR</b>						
<i>* averaged annual return</i>						