



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 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 of more than \$26 billion in charitable assets of more than 140 community foundations representing over 180 investment pools, for the period ended December 31st, 2020 as reported in February of 2021. 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

	2020 as of 12/31	1 Year	3 Years	5 Years	7 Years
n = # of survey participant investment pools	N=181	n=181	n=159	n=141	n=134
NWCTCF- New Haven Pool	16.8	16.8	9.0	9.7	8.9
All Community Foundations	11.8	11.8	7.6	9.3	6.9
Peer Data: \$100 Million to \$250 Million	12.3	12.3	8.0	9.6	6.9
Ranked #15 for all community foundations reporting YTD*					
Ranked #15 for all community foundations reporting 1YR*					
Ranked #35 for all community foundations reporting 3 Year AAR					
Ranked #49 for all community foundations reporting 5 year AAR					
Ranked #6 for all community foundations reporting 7 year AAR					
Ranked #9 for all community foundations reporting 10 year AAR					
<i>* averaged annual return</i>					

