COMMUNITY FOUNDATION
OF GREATER FORT WAYNE

ESG PORTFOLIO
INVESTMENT SUMMARY

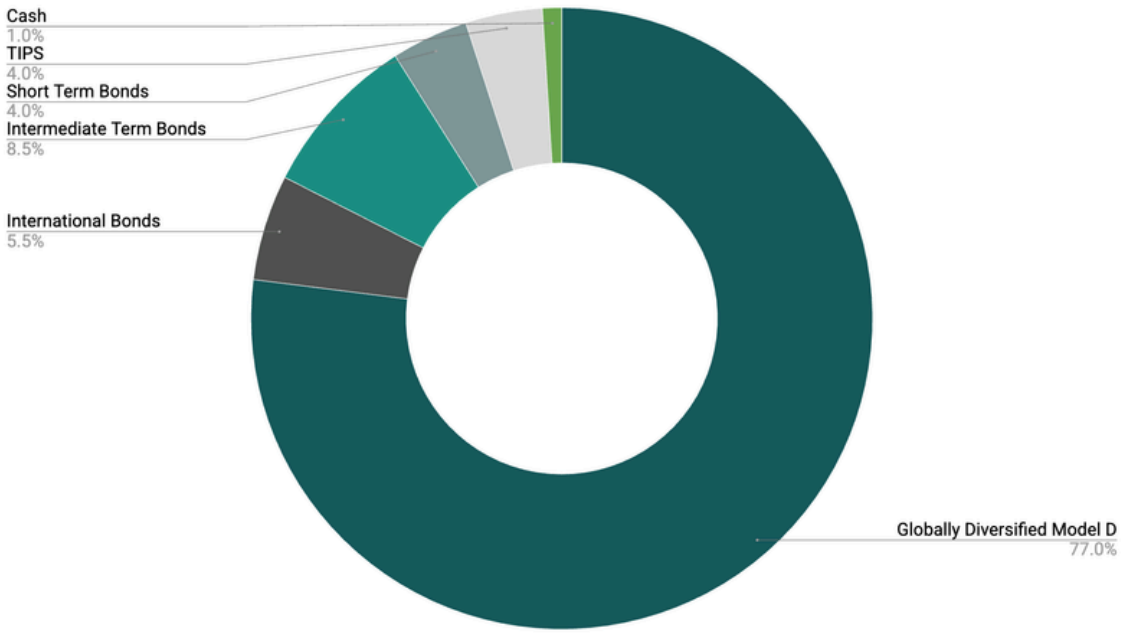
The ESG Pool is an investment allocation that is sensitive to environmental, social, and governance (ESG issues and follows socially responsible investment strategies. This Pool will have approximately the same overall stock/bond allocation as the Long Term Pool.

Performance Through 9/30/26

	QTD	YTD	1-Year	3-Year	Since Inception 7/1/2021
Greater Fort Wayne	-0.48%	9.23%	12.62%	16.80%	6.61%
Equity Biased Growth Reference Point	-0.51%	9.70%	12.14%	15.65%	7.22%
70/30 Stock Bond Mix	0.06%	8.10%	10.97%	16.39%	7.47%

Past performance is not indicative of future results.

Asset Allocation — ESG Portfolio



Disclosures

Mason Investment Advisory Services, Inc. (Mason) was hired by the Foundation in January 2017. All performance data prior to January 31, 2017 is represented by a previous investment advisor. All investing is subject to risk, including the possible loss of the money you invest. There is no guarantee that any particular asset allocation or mix of funds will meet your investment objectives or provide you with a given level of income. Diversification does not ensure a profit or protect against a loss. The 70/30 stock/bond mix is comprised of the S&P Global BMI for global stocks, and the Bloomberg Global Aggregate TR USD for global bonds. It is not possible to invest directly in an index.