COMMUNITY FOUNDATION
OF GREATER FORT WAYNE

# MEDIUM TERM POOL
## INVESTMENT SUMMARY

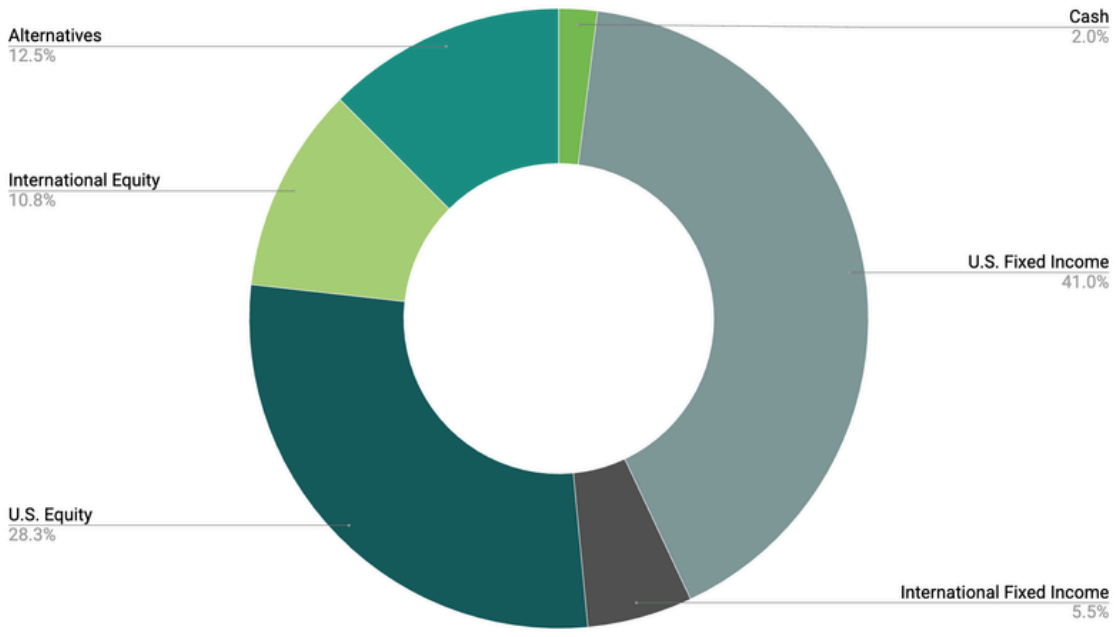
The primary investment objective of the Medium Term Pool (Pool) is to provide a balanced mixture of safety, income, and capital appreciation. This Pool may experience moderate year-to-year volatility. This Pool is generally appropriate for non-endowed funds with an intermediate time horizon of more than five years.

### Performance Through 9/30/26

| | QTD | YTD | 1-Year | 3-Year | Since Inception 2/16/2023 |
|---|---|---|---|---|---|
| **Medium Term** | -1.62% | 6.06% | 8.15% | 11.10% | 9.16% |
| **Conservative Reference Point** | -1.74% | 3.45% | 5.15% | 10.21% | 8.21% |
| **52/48 Stock/Bond Mix** | -0.58% | 5.35% | 7.25% | 12.96% | 10.54% |

Past performance is not indicative of future results.

### Asset Allocation — Medium Term Pool




### 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 52/48 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.