

# THE VERMONT COMMUNITY FOUNDATION

TOTAL RETURN PERFORMANCE (net of management fees)

9/30/2024

<b>ANNUALIZED RETURNS:</b>	<b>Long-Term Pool (%)</b>	<b>Market Index* (%)</b>	<b>SR Pool (%)</b>	<b>Mid-Term Pool (%)</b>	<b>CPI (%)</b>
1 YR ENDING 09/30/2024	19.3	20.7	22.7	16.9	2.4
3 YRS ENDING 09/30/2024	2.5	4.2	4.9	2.9	4.7
5 YRS ENDING 09/30/2024	7.2	8.7	8.4	6.3	4.2
7 YRS ENDING 09/30/2024	6.3	7.6	7.6	5.8	3.6
10 YRS ENDING 09/30/2024	6.7	7.2	7.5	5.6	2.9
FROM INCEPTION	7.8	8.3	6.0	5.9	2.7
YTD - 2024	10.4	11.5	11.8	10.2	1.9
2023	12.7	13.1	15.9	10.4	3.3
2022	-14.4	-13.5	-15.1	-12.2	6.4
2021	12.8	12.1	12.2	8.0	7.1
2020	8.4	12.1	12.9	11.1	1.3
2019	17.1	17.9	19.6	14.5	2.2
2018	-5.1	-5.4	-4.0	-3.4	1.8
2017	16.7	15.3	15.8	11.8	2.2
2016	8.7	7.1	7.5	6.2	2.0
2015	-1.4	-2.6	0.0	0.4	0.4
2014	5.0	2.8	7.3	5.5	0.8
2013	16.3	13.7	14.6	9.7	1.4
2012	11.9	11.0	10.9	NA	1.6
2011	-0.4	-2.5	-1.0	NA	2.9
2010	13.7	12.1	9.3	NA	1.5
2009	28.0	24.3	25.6	NA	2.7
2008	-27.5	-29.1	-29.9	NA	0.1
2007	13.0	8.6	7.4	NA	4.1
2006	15.1	15.3	NA	NA	2.9
2005	7.6	5.6	NA	NA	3.4
2004	12.0	11.4	NA	NA	3.3
2003	24.0	25.4	NA	NA	1.9
2002	-11.1	-12.6	NA	NA	2.4
2001	-7.2	-3.7	NA	NA	1.6
2000	1.4	-0.9	NA	NA	3.4
1999	13.8	11.4	NA	NA	2.7
1998	7.1	21.4	NA	NA	1.7
1997	19.4	23.7	NA	NA	1.7
1996	14.6	14.7	NA	NA	3.2
1995	23.4	30.0	NA	NA	2.6
1994	-2.7	-0.6	NA	NA	2.6
1993	9.7	10.5	NA	NA	2.8
1992	4.7	7.7	NA	NA	3.0
1991	17.3	24.9	NA	NA	3.0
1990	3.3	1.5	NA	NA	6.3
1989	17.1	24.6	NA	NA	4.6

*\*Market Index is 60% S&P 500/40% Lehman Aggregate Index from 1989 to 2001. Beginning in 2002, this benchmark consists mix of standard market indices weighted according to the Foundation's asset allocation policy.*