



University of Colorado
Foundation

Investment Policy Benchmark

The Foundation's Investment Policy Committee updated its Investment Policy Statement, including the Policy Benchmark, in the spring of 2017. Effective fiscal year 2018, the policy benchmark is a blend of 80% MSCI ACWI (equities) and 20% Barclays US Aggregate Bond Index (fixed income). For returns presented for years prior to fiscal year 2018, historical benchmarks of 40% Russell 3000, 40% MSCI EAFE and 20% Barclays US Agg (FY 2009 – 2017) and 50% Russell 3000, 30% Barclays US Agg and 20% MSCI EAFE (fund inception – FY 2008) are components as applicable.