UC’s endowment capital totals close to $1.2 BILLION in 1,800 discrete endowment funds contributed by individual donors to support scholarships, research, professorships, and educational programs.

ENDOWMENT INVESTMENTS GAIN $147 million

Over the twelve-month fiscal year that ended June 30, 2014, UC’s investment portfolio generated a 17.3% gain.

During the period, all investment categories generated gains.
  - Private real assets saw a 32% return
  - U.S. equity investments rose 25%

TRAILING 3-YEAR

Investment Performance .......9.9% per year
Investment Gains..............$271 million
Distributions to Support UC ...$162 million

OUTPERFORMED BENCHMARKS

Over the trailing three-year and five-year periods, the investment portfolio generated gains of 10% and 13% respectively.

INVESTMENT PORTFOLIO VS BENCHMARKS

Over the past two decades, the investment portfolio has outperformed the mission benchmark, its most important long-term performance benchmark.

ENDOWMENT AT A GLANCE

UC’s endowment provides a uniquely predictable, growing and permanent source of funding, that enables the university to:
  - support multi-decade commitments (such as tenured professorships)
  - provide resources to attract superior students
  - help control tuition costs
  - facilitate long-term planning
  - enhance the university’s financial independence

Let us make the most of your gift.
UC and the UC Foundation have demonstrated a commitment to balancing the needs of today with the needs of the future. UC has lowered its spending policy to 4.5% and the Foundation has lowered its fundraising fee. These actions leave more capital in the endowment to grow and compound, enabling the endowment to provide the same vital support to future generations of UC scholars as it does today.

Since 1978, the endowment pool has provided $1.1 BILLION in funding while growing to $1.2 BILLION principal.

For more information:

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