



Faith-Based Financial Solutions | Investment Services Driven by Your Mission

The Georgia United Methodist Foundation (GUMF) is pleased to provide you with this exclusive Investment Quarterly Review. GUMF is the exclusive distributor of the I Series of the Wespath Institutional Investments (Wespath) funds to United Methodist entities within the State of Georgia.

Market and Wespath Fund Performance¹

- **Fund Performance:** Net-of-Wespath-fees performance through March 31, 2022, is available [here](#).
 - **Markets at a Glance Video Update:** Wespath's Trent Sparrow, Manager, Impact Investments, [provides a video update on the markets](#), including ongoing volatility and uncertainty from Russia's invasion of Ukraine, the lowest fixed income performance in four decades, and the Fed's response to high inflation.
 - **Monthly Investment Report:** Read Wespath's full market and fund performance commentary in the [March 2022 Monthly Investment Report](#).
 - **Russia's Invasion of Ukraine:** The world continues to witness the devastating outcomes resulting from Russia's unprovoked attack on Ukraine. We continue to pray for peace and safety for all those impacted by this senseless war. Over the last six weeks as the conflict unfolded, Wespath Chief Investment Officer Dave Zellner wrote to investors to respond to the [resulting market volatility](#) as well as the [U.S. ban on Russian oil imports](#).
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Wespath Sustainable Investment Quarterly Highlights²

- **Wespath Featured in PRI Human Capital Management Report:** "Human capital" refers to a company's workforce and all the knowledge, skills and abilities its people bring. Wespath believes human capital is a valuable ESG metric and an important factor in the way Wespath – and crucially, its external asset managers – evaluate and monitor a company's performance. Read more about Wespath's perspective in this [report from PRI](#).
 - **Partnering to Support an Equitable and Just Transition to Net-Zero:** In February, Wespath joined 95 global investors, through the Interfaith Center on Corporate Responsibility (ICCR) to publish a statement that included resources intended to help investors promote a just net-zero transition. [Read the statement now](#).
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Fiduciary Focus Educational Series

- **Investment Complexity and Operating Models:** Which asset classes and investment vehicles are optimal for your organization? In this article, Wespath highlights the factors you should consider when structuring your institutional investment portfolio.
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- [Dude, Where's My Peloton?](#): From the rise and fall of Peloton, to Zoom's surprising cool down, Joe Halwax, Wespath Managing Director of Institutional Investment Services, looks back at stock trends over the last two years.
- [A Personal Connection to Wespath's Values](#): Jake Barnett, Director of Sustainable Investment Stewardship, shares how a personal tragedy strengthened his commitment to Wespath's sustainable investment work addressing opioid accountability and beyond.
- [Does Bitcoin Belong in a Traditional Investment Portfolio?](#): From trending on Twitter to taking the investment world by storm, is cryptocurrency here to stay? Wespath Senior Analyst Fred Huang discusses what Bitcoin is, how it's created, and if it has a place in investment portfolios.
- [Wespath's Favorite Investment Podcasts, Commentaries and Twitter Follows](#): With so many platforms and resources on the internet, it can be overwhelming to know what to read, listen to or watch. Wespath Managing Director of Institutional Investment Services Joe Halwax shares his favorite investment-focused online resources, podcasts and Twitter accounts.

¹ Historical returns are not indicative of future results. The Wespath investment funds are neither insured nor guaranteed by the government. For more information about the funds, please see the Wespath [Investment Funds Description – I Series](#)

² Wespath Benefits and Investments implements the sustainable investment strategies for investment funds made available through it and its subsidiaries, including Wespath Institutional Investments.

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Wespath Institutional Investments is located at 1901 Chestnut Ave., Glenview, IL 60025.

Contact Us

Investing with Wespath Institutional Investments through the Georgia United Methodist Foundation allows your church or organization to focus on its own good work, while reaching its financial objectives. To learn more, visit gumf.org or contact:



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