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The Georgia United Methodist Foundation is pleased to provide you with this exclusive Investment Quarterly Review. The Foundation 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, 2023, [is available here](#). Wespath's March Monthly Investment Report covers fund performance, as well as the latest market and economic developments. The report [is available here](#).
 - **Q1 Market Takeaways:** There's no doubt that the news surrounding failing banks was the biggest storyline of the first quarter. But as Wespath looks to the future, market movements will likely continue to be driven by inflation and central banks—a continuation of what has influenced markets for the last 18 months. Joe Halwax, Wespath Managing Director, Institutional Investment Services, recaps the latest headlines in this blog post.
 - **Q1 Market Review Video:** While failure in the banking industry and persistent inflation created a great deal of negative news, fresh uncertainty in Q1 was coupled with renewed optimism within many sectors. In Wespath's latest quarterly recap video, Frank Holsteen, Managing Director, Investment Management, highlights gains in both the S&P 500 and Nasdaq indexes and other important storylines from the first three months of the year.
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New Thought Leadership on Wespath's *Investment Insights* Blog

- **[Wespath's Refreshed Investment Beliefs:](#)** Wespath has refreshed its Investment Beliefs! These five investment beliefs integrate all the convictions reflected in its previous ten beliefs, explain its investment approach and highlight the things Wespath considers when making investment decisions.
- **[Should Investors Be Worried About the Debt Ceiling Debate?](#)** While Congress and the White House continue to negotiate raising the debt ceiling, some investors have started to ask whether the debate will lead to financial market volatility this year. Joe Halwax, Wespath Managing Director, Institutional Investment Services, reviews the debt ceiling discussion.

Wespath Video Resources

- [Wespath's Investment Beliefs](#): To gain a better understanding of Wespath's refreshed Investment Beliefs, check out this video playlist detailing each of its five Beliefs.
- [Unscripted – Paul Bodnar of BlackRock](#): BlackRock's Global Head of Sustainable Investing, Paul Bodnar, sits down with Mark Warren, Wespath Manager, Public Equities, to discuss how BlackRock is analyzing and mitigating the financial risks of climate change for its clients through its investment approach.

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:



Mathew A. Pinson
President and CEO
Georgia United Methodist Foundation
770.449.6726 (Office)
mpinson@gumf.org



Dr. Laudis H. "Rick" Lanford
Regional Vice President
Georgia United Methodist Foundation
478.256.7130 (Cell)
rlanford@gumf.org

