

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

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 June 30, 2022, is available [here](#).
- **Markets at a Glance Video Update:** Nízida Arriaga, CFA, Wespath Manager of Fixed Income, provides a [video update on the markets](#). She recaps decades-high inflation, Fed rate hikes, slowing economic growth, the effects of consumer sentiment and more.
- **Monthly Investment Report:** Read Wespath's full market and fund performance commentary in the [June 2022 Monthly Investment Report](#).



Wespath Sustainable Investment Quarterly Highlights²

- **[Investor Statement on Crisis in Ukraine:](#)** Wespath is committed to sustainable investment practices that support human rights. Amid the conflict in Ukraine, Wespath joined 54 investors to condemn Russia's invasion and provide steps that guide portfolio actions in support of the people and democratic institutions of Ukraine.



New Thought Leadership on the *Investment Insights* Blog

- **[Markets In Review—What Happened in the First Half of 2022:](#)** Wespath Managing Director Joe Halwax provides perspective on the market's downturn, including an in-depth look at the highest inflation in 40 years, the probability of a recession, stocks in bear market territory, Fed interest rate hikes, double-digit bond losses, and how the Wespath balanced fund fared so far this year.
- **[Can Negative Consumer Sentiment Be a Positive Market Indicator?:](#)** Frank Holsteen, Wespath Managing Director of Investment Management, discusses how gloomy consumer sentiment has historically indicated that above-average market returns will soon follow.
- **[Why Investors Should Care About Food, Agriculture and](#)**

Biodiversity: The food and agriculture sector is directly affected by a wide number of sustainability issues. Wespath Sustainable Investment Analyst Ryan McQueeney highlights how these challenges create fiduciary risks and opportunities, and how Wespath is seeking to address them.

- **[Solar Power “Electrifying” Low Income Housing Communities](#)** Jon Strieter, Wespath Impact Investment Analyst, shares why they’re adding solar energy to several of their Positive Social Purpose investments, and describes how solar provides energy efficiency and utility cost savings for many communities.
- **[Inflation and the 60/40 Portfolio](#)**: It has been more than 40 years since we’ve seen inflation at its current level. Even more unusual, it’s negatively affecting both equity and bond prices. In this blog post, Wespath Managing Director Joe Halwax dives into this inflationary environment.
- **[Three Considerations for Investors Hiring an OCIO Provider](#)**: Karen Manczko, Wespath Director of Institutional Investment Services, shares three important considerations for not-for-profit investors when hiring an Outsourced Chief Investment Officer (OCIO).



Video Resources

- **[Partnering with Wespath](#)**: Mission. Impact. Performance. Wespath is passionate about serving the investment needs of their faith-based, not-for-profit clients every day. This two-minute video explains how Wespath can help grow your mission. Watch and share this resource within your own communication channels!
- **[Unscripted: Lawrence Burns of Baillie Gifford](#)**: Lawrence Burns of international equities asset manager Baillie Gifford discusses how the firm seeks to identify “the world’s most exceptional growth companies outside of the U.S.,” with a focus on companies driving large structural trends across the globe.
- **[Unscripted: Kempton Ingersol of Brown Capital Management](#)** Mark Warren, Wespath Manager of Public Equities, sits down with Kempton Ingersol of Brown Capital Management, one of Wespath’s U.S. equities “small company” asset managers. Together, they discuss notable companies and themes in the U.S. equity market.

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.

Contact Us

Investing with Wespeth 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

