



THE SOUTH CAROLINA UNITED METHODIST FOUNDATION, INC.

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PEE DEE

THE RESTRICTED ENDOWMENT FUND

TOTAL RETURN

“Total Return” is a representation of investment performance commonly used in the securities industry to compare performance. Total return represents the percentage of difference in the value of an investment at the beginning of a particular period and at the end of the period assuming the reinvestment of all of the investment’s income for the period.

The figures shown represent the annual total return of a unit in the Foundation’s Restricted Endowment Fund for the particular calendar year without the imposition of the Foundation’s administration fee. The asset allocation of the Foundation’s Restricted Endowment Fund is approximately sixty-five percent (65%) cash and fixed income and thirty-five percent (35%) equities and is based on book value. The Foundation uses mutual funds for the equity portion of its asset allocation. Past performance is no guarantee of present or future performance.

Calendar Year	Total Return
2025	12.373%
2024	10.229%
2023	14.217%
2022	(16.125%)
2021	9.488%
2020	15.376%
2019	26.276%
2018	(5.165%)
2017	11.064%
2016	4.798%
2015	0.350%
2014	6.719%
2013	9.949%
2012	11.293%
2011	0.782%
2010	10.630%
2009	19.301%
2008	(17.088%)
2007	7.820%
2006	8.663%