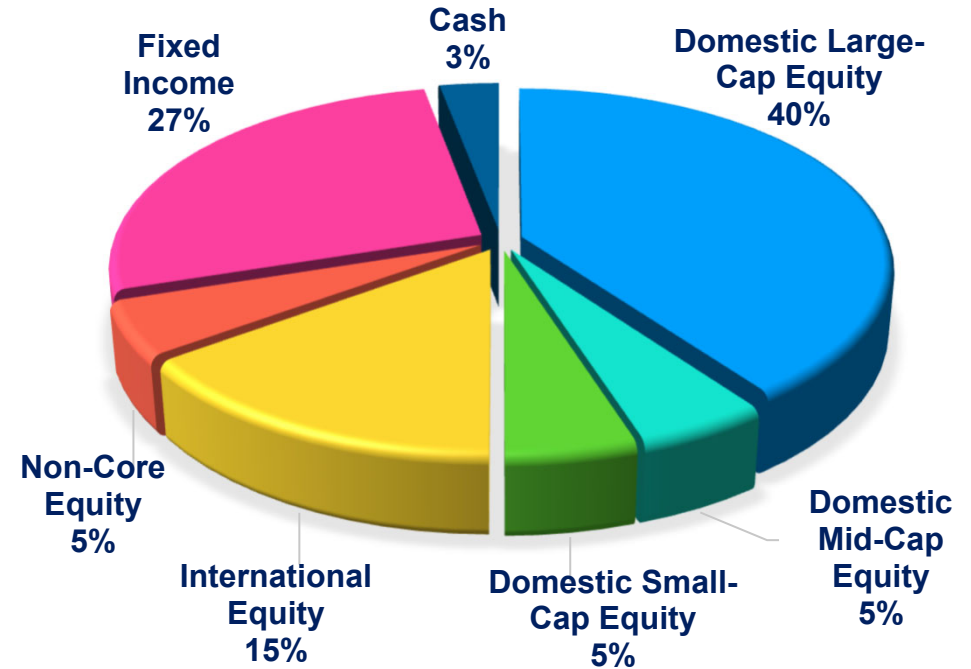


# Baird Trust Pool

This pool's investment philosophy centers Baird's "Core + Satellite" approach which offers thoughtful portfolio diversification following Baird's valuation-based asset allocation process. The allocation of the pool's portfolio is comprised of large-cap companies and investment grade fixed income securities. The allocation may include exposure via low-cost mutual funds and ETFs to mid-cap, small-cap and international equities.



As of March 31, 2025

Annualized Periods Ending December 31, 2024

	QTR	Year Ended 12/31/2024	3 Yr.	5 Yr.	7 Yr.	10 Yr.
<b>Baird Trust Pool</b>	1.4%	16.2%	5.0%	9.6%	9.4%	8.8%
<b>Benchmark Index *</b>	-1.2%	14.6%	4.9%	8.8%	8.5%	8.4%

**Total Pool Balance: \$6,893,308**

**Donor Funds in the Pool: 19**



\*50% S&P 500, 15% MSCI ACWI Ex USA NR USD, 5% Russell 2000 Index TR, 28% Bloomberg US Government/Credit Interm Bond, 2% 3 mos Treasury Bill