

## The Foundation

- Eight Investment Advisors
- \$77.6 million in assets
- More than 450+ funds to donate to at Marion Community Foundation

### Please Visit Us

[www.MarionCommunityFoundation.org](http://www.MarionCommunityFoundation.org)

### Contact Us

Marion Community Foundation  
504 South State Street  
Marion, OH 43302  
P: 740.387.9704  
E: [info@MarionCommunityFoundation.org](mailto:info@MarionCommunityFoundation.org)



## FOUNDATION PERFORMANCE

In Q3, the economy maintained stable growth despite a weakening labor market, supported by resilient corporate earnings and consumer spending. Equity markets surged, led by AI-driven gains in large-cap tech stocks – S&P 500 +8.1%. Russell 2000 +12.4%, and MSCI Emerging Markets +10.0%. Treasury yields declined and credit spreads narrowed, contributing to strong fixed income performance. Looking ahead, recession risks are easing, but inflation and fiscal concerns may keep long-term rates elevated.

Historical performance of the Foundation is shown below:

	QTD	YTD	1 YR	3 YRS	5 YRS	7 YRS
Marion Community Foundation	<b>5.1%</b>	<b>13.5%</b>	<b>13.0%</b>	<b>16.5%</b>	<b>9.1%</b>	<b>8.0%</b>
<i>Strategic Benchmark</i>	5.7%	14.1%	12.4%	17.1%	9.3%	8.4%
<i>CPI + 5.0%</i>	2.0%	6.5%	8.1%	8.2%	9.7%	8.8%

	2024	2023	2022	2021	2020	Since Inception
Marion Community Foundation	<b>12.6%</b>	<b>16.2%</b>	<b>-15.8%</b>	<b>12.2%</b>	<b>12.4%</b>	<b>6.3%</b>
<i>Strategic Benchmark</i>	12.1%	17.0%	-16.0%	12.2%	12.7%	6.6%
<i>CPI + 5.0%</i>	7.9%	8.3%	12.5%	12.1%	6.2%	7.8%

Data as of 09/30/2025.

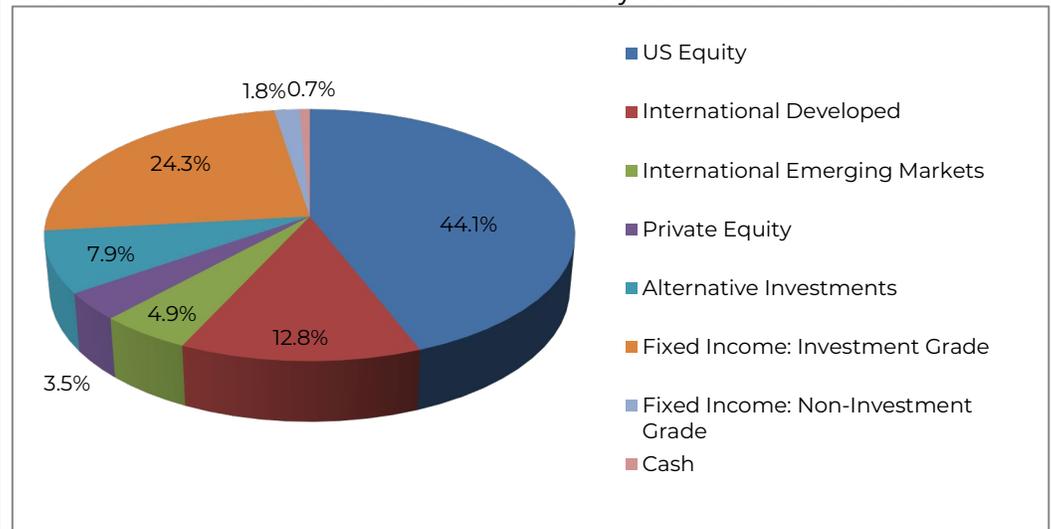
Performance Inception: April 2011.

Benchmark: 44% Russell 3000, 15% MSCI EAFE, 7% MSCI Emerging Markets, 6% BofA Merrill Lynch US High Yield BB-B Rated, 28% BBgBarc US Aggregate

Performance represents past performance. Past performance is not a guarantee or a reliable indicator of future results. The Foundation's returns are net of investment manager fees, but not net of custody and advisory fees.

## FOUNDATION ASSET ALLOCATION

The current asset allocation of Marion Community Foundation is detailed below:



Allocation as of 09/30/2025.