



INVESTMENT PORTFOLIOS

FEBRUARY 4, 2025

Greetings in Faith,

I am pleased to share this year's highlights on the Diocesan investment program.

The Diocesan Investment Program

The Diocese offers three investment options for parishes: the Diocesan Investment Fund (DIF), which is a long-term investment portfolio; the Diocesan Socially Responsible Investment Fund (SRIF), which is a long-term portfolio that emphasizes gospel value priorities; and the Diocesan Short-Term Investment Fund (STIF), a cash-like investment for investors who expect to use assets within the next 18 months.

Investment Committee Updates

In January 2024, retired Diocesan Investment Committee (DIC) member, Roger Neu, passed away. Roger served faithfully on the DIC for decades. Please join us as we celebrate Roger's life and lasting contributions to the Diocesan investment program, which continue to positively impact so many parishioners. In October, long-time member Dick Anderson retired from the DIC after 20+ years of faithful service. I want to extend our thanks to Dick for his support, commitment, and participation in the DIC. A warm welcome to Susan Workman, Rev. Jaime Sanders, Madeline Moore, and Marci Welch, the four newest members of the Diocesan Investment Committee.

Key Investment Initiatives in 2024

- In the second quarter, the Committee approved revisions to the Diocesan Investment Policy Statement, streamlining the asset allocation targets for the DIF and SRIF.
- In the third quarter, the Committee approved the renewal of a 3-year community impact investment note from Craft3 within the SRIF.
- The subcommittee for stakeholder outreach is actively contacting each parish invested with the Diocese. If you haven't already, please expect to hear from a DIC member in early 2025.

In Closing

I look forward to what 2025 will bring. More information on the Diocesan investment program—including the DIF, SRIF and STIF—is available on the Diocesan website at <https://ecwo.org/investments/>. You may also contact me or Anne Marie Lowe, Canon for Finance & Property, at 971-204-4155 or amlowe@ecwo.org.

Best Regards on behalf of the Diocese of Oregon Investment Committee,

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Appendix:

Returns as of December 31, 2024

