

Montana

Hedge Funds Deliver for Montana Retirees, Students, and Nonprofits. Across Big Sky Country, hedge funds deliver for retirement security, college education, and the important work done by nonprofits and charities through \$1.31 Billion in investments. Institutional investors – like pensions, university endowments, and nonprofits – use hedge funds to meet financial obligations, diversify their investment portfolios, and manage risk.

Total hedge fund investments:

\$1.31 **billion**

Deliver for pensions: \$327 Million Deliver for colleges & universities: \$60 Million Deliver for nonprofits: \$919 Million



Retirement Plans

invest roughly \$327 Million in hedge funds



Colleges & Universities

Deliver for colleges: \$60 Million

At Least 2 colleges and universities invest in hedge funds including:

Montana State University Foundation \$39 Million for 16,841 students

University of Montana Foundation

- \$21 Million for
- 10,106 students



Foundations & Nonprofits

Deliver for nonprofits: **\$919 Million**

At Least 1 foundation or nonprofit invests in hedge funds:

Montana Community Foundation | \$14 Million

Hedge fund investment data is primarily sourced and licensed from Preqin's alternative asset database as of February 2022 or publicly available, federal datasets. Additional information on sources is available

at investinginopportunity.org.

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