

Kentucky

Hedge Funds Deliver for Kentucky Retirees, Students, Nonprofits, and Small and Mid-Size Businesses.

Across the Bluegrass State, hedge funds deliver for retirement security, college education, and the important work done by nonprofits and charities through \$6.16 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:

\$6.16 BILLION

Deliver for pensions: \$2.69 Billion

Deliver for colleges & universities: \$388 Million

Deliver for nonprofits: \$3.08 Billion

\$10.11 Billion in private credit provided by private funds to businesses of all sizes



Retirement Plans

Deliver for pensions: \$2.69 Billion

At Least 5

retirement plans invest in hedge funds including:

Colleges & Universities

Deliver for colleges:

\$388 Million

At Least 10

colleges and universities invest in hedge funds including:



\$944 Million for 382,637 plan participants

United Continental Holdings Pension Plan

\$432 Million for 84,916 plan participants

Teamsters Local 2727 Retiree Medical **Benefits Trust**

\$18 Million for 1,737 plan participants

University of Kentucky Endowment

\$238 Million for 33.885 students

University of Louisville Foundation

\$83 Million for **23,043** students

Centre College of Kentucky Endowment

\$51 Million for 1,400 students



Foundations & Nonprofits

Deliver for nonprofits:

\$3.08 Billion

At Least 4

foundations and nonprofits invest in hedge funds including:

Norton Healthcare

\$399 Million

Asbury Theological Seminary

\$34 Million

Ray and Kay Eckstein Charitable Trust \$6 Million

6 Hedge Funds

are based in the Bluegrass State.

Data sourced from Hedge Fund Alert 2023 state rankings.

Hedge fund investment data is primarily sourced and licensed from Pregin's alternative asset database as of February 2024 or publicly available, federal datasets. Additional information on sources is available at investinginopportunity.org.

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