

Montana

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

Across Big Sky Country, hedge funds deliver for retirement security, college education, and the important work done by nonprofits and charities through \$475 Million 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:

\$475 MILLION

Deliver for pensions: **\$277 Million**

Deliver for colleges & universities: **\$72 Million**

Deliver for nonprofits: **\$124 Million**

+ \$79 Million in private credit provided by private funds to businesses of all sizes



Retirement Plans

invest roughly
\$277 Million
in hedge funds



Colleges & Universities

Deliver for colleges:
\$72 Million
At Least 2
colleges and universities invest in hedge funds including:

Montana State University Foundation
| **\$39 Million for**
16,688 students

University of Montana Foundation
| **\$34 Million for**
8,094 students



Foundations & Nonprofits

Deliver for nonprofits:
\$124 Million
At Least 1
foundation or nonprofit invests in hedge funds:

Montana Community Foundation
| **\$34 Million**

1 Hedge Fund
is based in Big Sky Country.

Data sourced from Hedge Fund Alert 2023 state rankings.