

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 \$1.22 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:

\$1.22 BILLION

Deliver for pensions: **\$166 Million**

Deliver for colleges & universities: **\$44 Million**

Deliver for nonprofits: **\$1.01 Billion**

+ \$189 Million in private credit provided by private funds to businesses of all sizes



Retirement Plans

invest roughly
\$166 Million
in hedge funds



Colleges & Universities

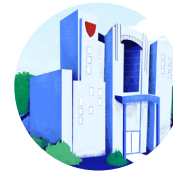
Deliver for colleges:
\$44 Million
At Least 2
colleges and universities invest in hedge funds including:

University of Montana Foundation

\$25 Million for
10,327 students

Montana State University Foundation

\$19 Million for
15,717 students



Foundations & Nonprofits

Deliver for nonprofits:
\$1.01 Billion
At Least 1
foundation or nonprofit invests in hedge funds:

Montana Community Foundation

\$16 Million

1 Hedge Fund

is based in Big Sky Country.

Data sourced from Hedge Fund Alert 2023 state rankings.