

# Wisconsin

Hedge Funds Deliver for Wisconsin Retirees, Students, Nonprofits, and Small and Mid-Size Businesses. Across the Badger State, hedge funds deliver for retirement security, college education, and the important work done by nonprofits and charities through \$13.48 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:

\$13.48 BILLION

Deliver for pensions: \$4.02 Billion

Deliver for colleges & universities: \$670 Million

Deliver for nonprofits: \$8.78 Billion

+ \$3.38 Billion in private credit provided by private funds to businesses of all sizes



### **Retirement Plans**

Deliver for pensions: **\$4.02 Billion** 

#### At Least 22

retirement plans invest in hedge funds including:

Employees' Retirement System of the City of Milwaukee

\$537 Million for 29,097 plan participants

Integrys Energy Group Master Retirement Trust

\$124 Million for 4,575 plan participants

Milwaukee County Employees' Retirement System

\$100 Million for 12,855 plan participants



### **Colleges & Universities**

Deliver for colleges: \$670 Million

#### At Least 8

colleges and universities invest in hedge funds including:

Marquette University Endowment

\$308 Million for 11,373 students

University of Wisconsin System

\$233 Million for 162,500 students

Lawrence University Endowment

\$66 Million for 1,502 students



## **Foundations & Nonprofits**

Deliver for nonprofits:

\$8.78 Billion

#### At Least 15

foundations and nonprofits invest in hedge funds including:

Advancing Healthier Wisconsin Endowment

\$238 Million

Lynde & Harry Bradley Foundation

\$167 Million

Wisconsin Alumni Research Foundation \$150 Million

11 Hedge Funds are based in the Badger State.

Data sourced from Hedge Fund Alert 2023 state rankings.

Hedge fund investment data is primarily sourced and licensed from Preqin'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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