

# 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 \$15.31 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:

\$15.31 BILLION

Deliver for pensions: \$4.89 Billion

Deliver for colleges & universities: \$374 Million

Deliver for nonprofits: \$10.04 Billion

+ \$5.20 Billion in private credit provided by private funds to businesses of all sizes



#### **Retirement Plans**

Deliver for pensions: **\$4.89 Billion** 

#### At Least 28

retirement plans invest in hedge funds including:

Employees' Retirement System of the City of Milwaukee

\$570 Million for 29,097 plan participants

Integrys Energy Group Master Retirement Trust

\$167 Million for 4,575 plan participants

Rockwell Automation Pension Plan

\$167 Million for 20,956 plan participants



### **Colleges & Universities**

Deliver for colleges: \$374 Million

#### At Least 9

colleges and universities invest in hedge funds including:

Marquette University Endowment

\$308 Million for 7,652 students

Lawrence University Endowment

\$66 Million for 1.410 students



## **Foundations & Nonprofits**

Deliver for nonprofits:

\$10.04 Billion

#### At Least 24

foundations and nonprofits invest in hedge funds including:

Wisconsin Alumni Research Foundation

\$ \$979 Million

Advancing Healthier Wisconsin

Endowment \$238 Million

Kern Family Foundation

\$183 Million

13 Hedge Funds are based in the Badger State.

Data sourced from Hedge Fund Alert 2025 state rankings.

Hedge fund investment data is primarily sourced and licensed from Preqin's alternative asset database as of March 2025 or publicly available, federal datasets. Additional information on sources is available

at investinginopportunity.org.

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