ENDOWMENTS & FOUNDATIONS ROUNDTABLE

For the next upcoming roundtable please contact:

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Endowments & Foundations Live Polling Results

Institutional Investor Institute and the Alternative Investor Institute hosted the Endowments and Foundations Roundtable between the 5th and 7th of June. Over 130 asset owners, from a range of demographics, gathered in Boston to discuss valuations, liquidity and challenges, as well as opportunities, that arise from the macro and investment environment.

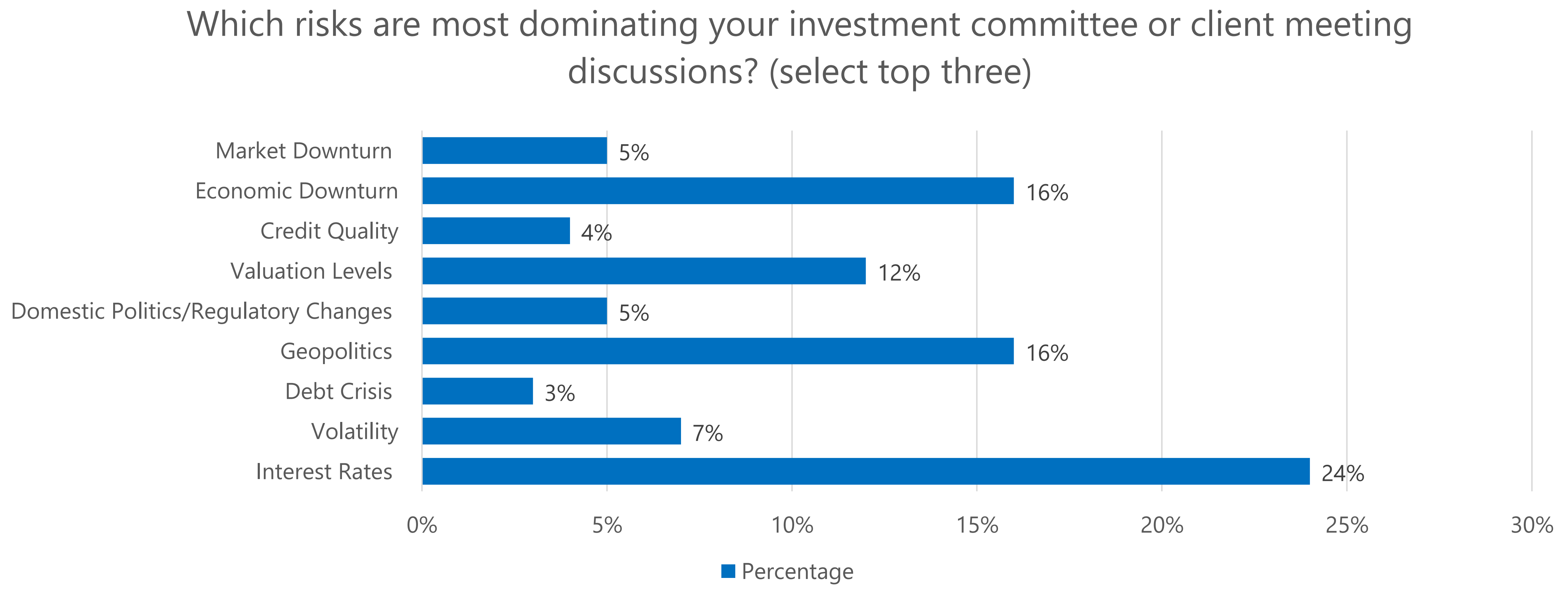
Prevailing Thoughts

The belief that the current period may be viewed in retrospect as a prime opportunity to deploy capital, and achieve exceptional returns, was a dominant theme throughout the 3 days.

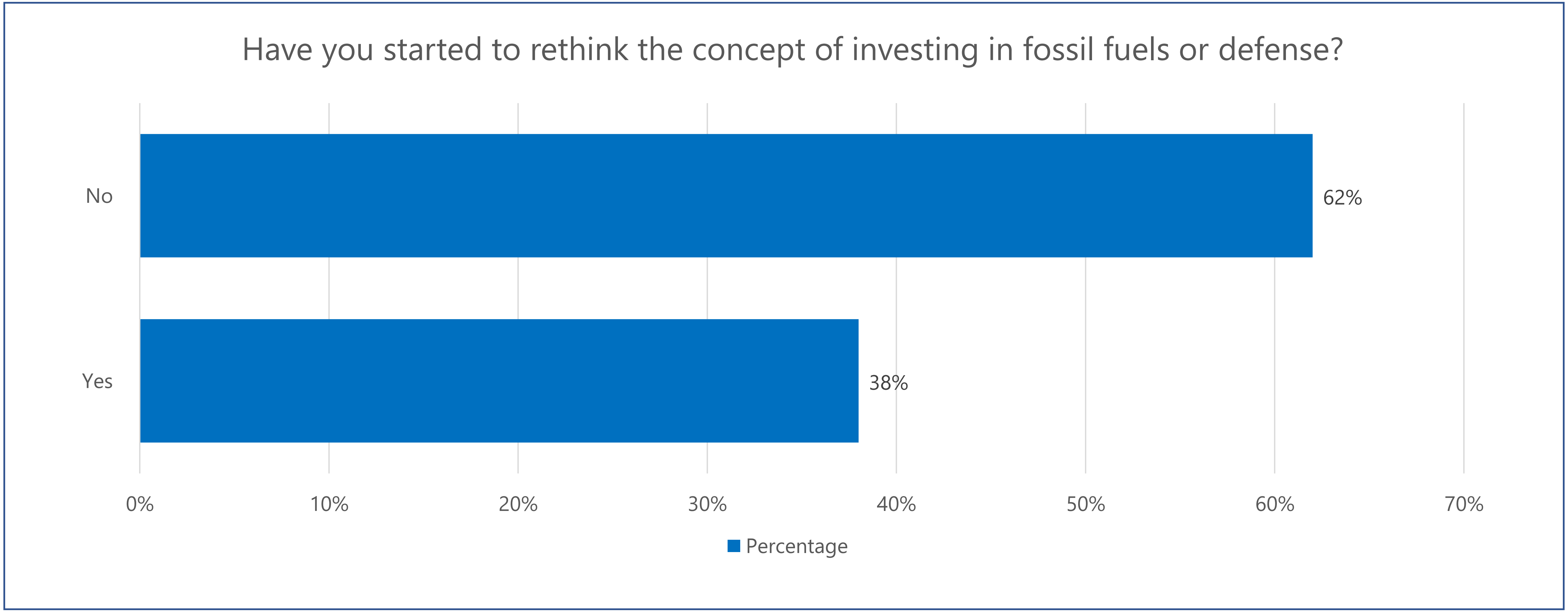
Polling Demographics

Live polling took place with 30% of respondents being endowments, 25% foundations, 35% investment consultants and 10% other (public pension plans and healthcare organisations). Half of the respondents, 50%, had an AUM between 1bn to 10bn. 35% of the respondents had an AUM over 25bn and 11% had and AUM of 1bn or less. Below are some of the findings from the live polling at the Institutional Investor Institute followed by those in the alternatives space. In the latter, 51% of respondents were endowments, 20% were foundations, 20% investment consultants and 9% were healthcare organizations.

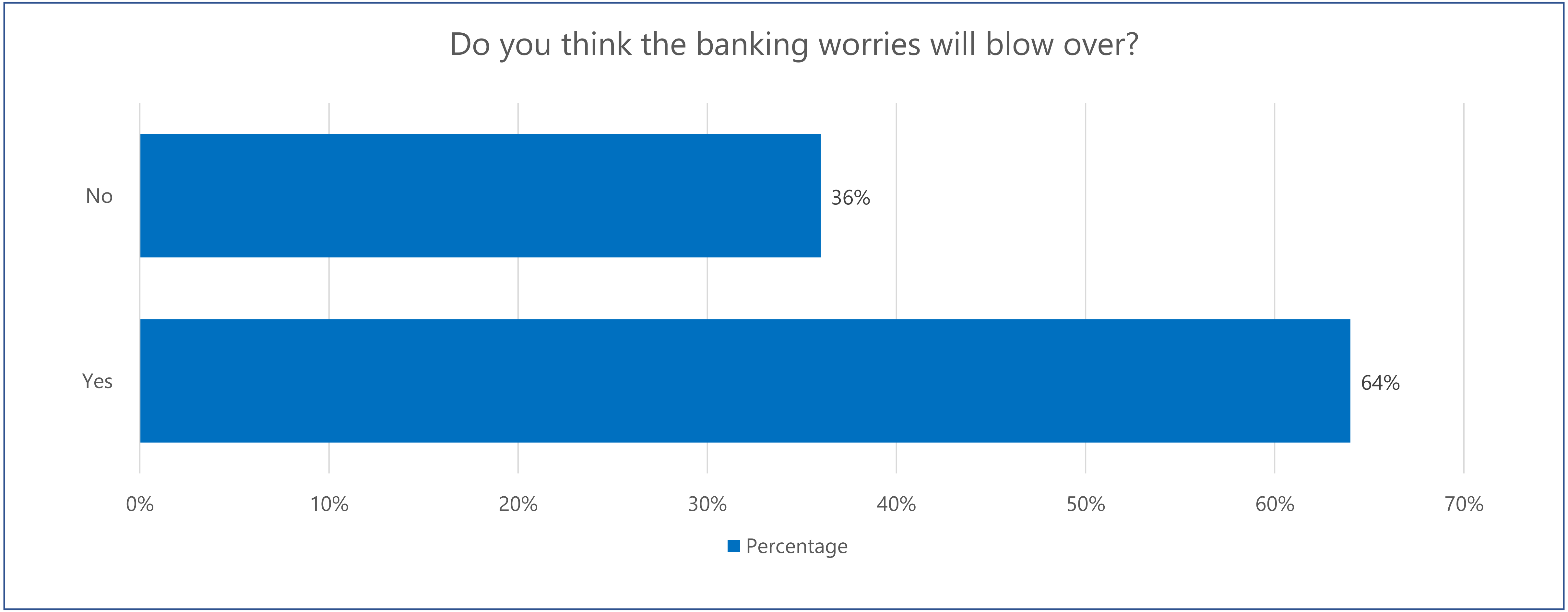
Interest Rates, Geopolitics and Economic Downturn Dominate Conversations



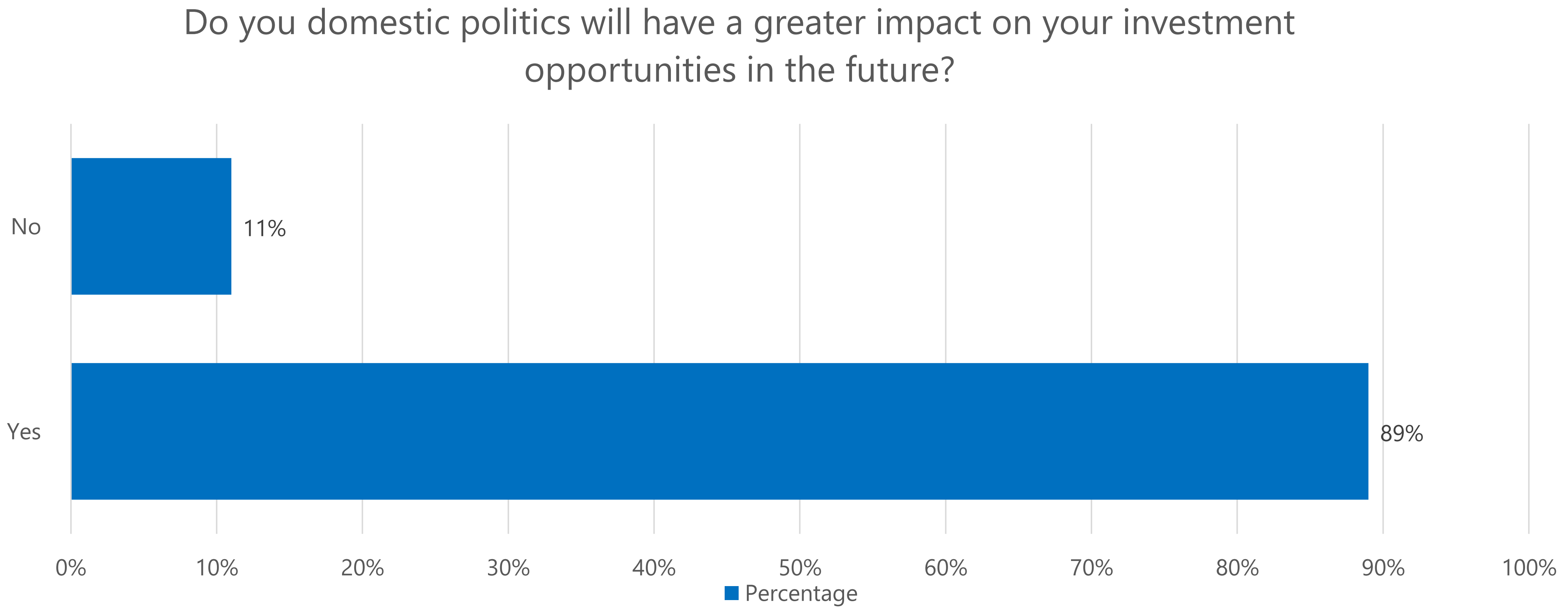
Investing In Fossil Fuels May Be Back On The Table For Some



Some Confidence in Banking Worries Blowing Over

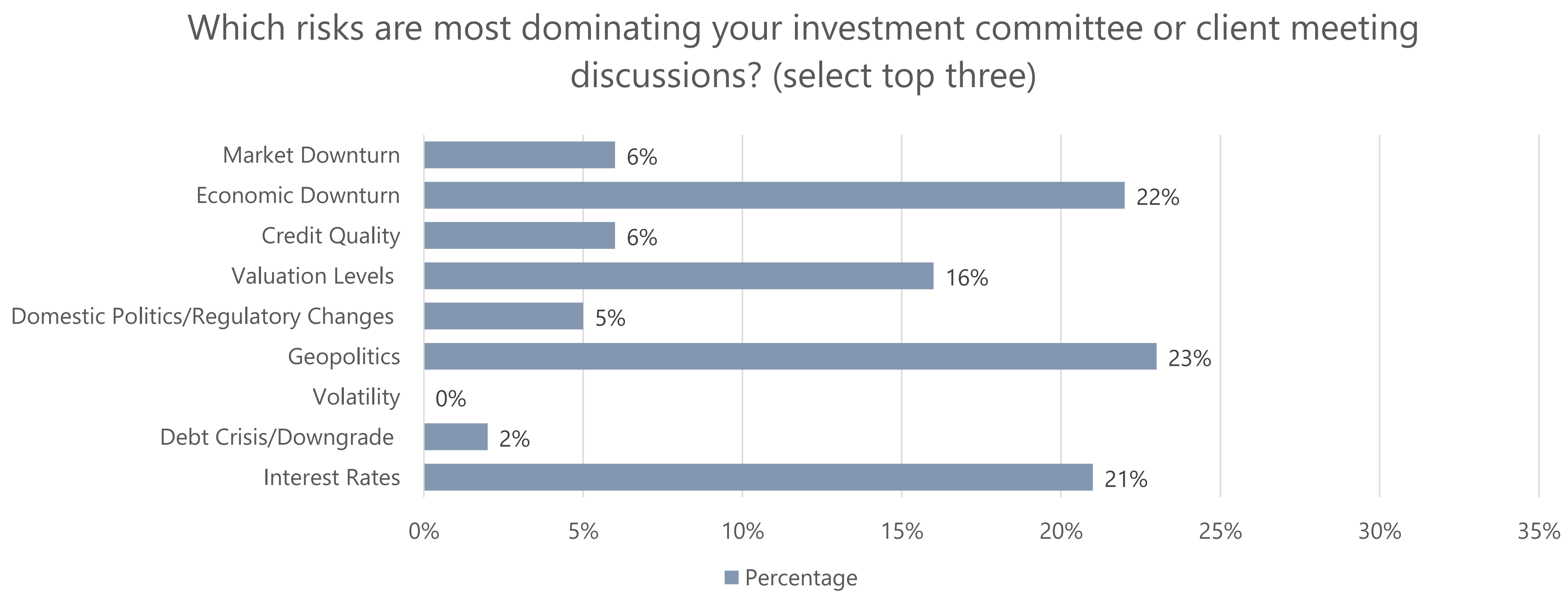


Most Believe Domestic Politics will have a Greater Impact on Investment Opportunities

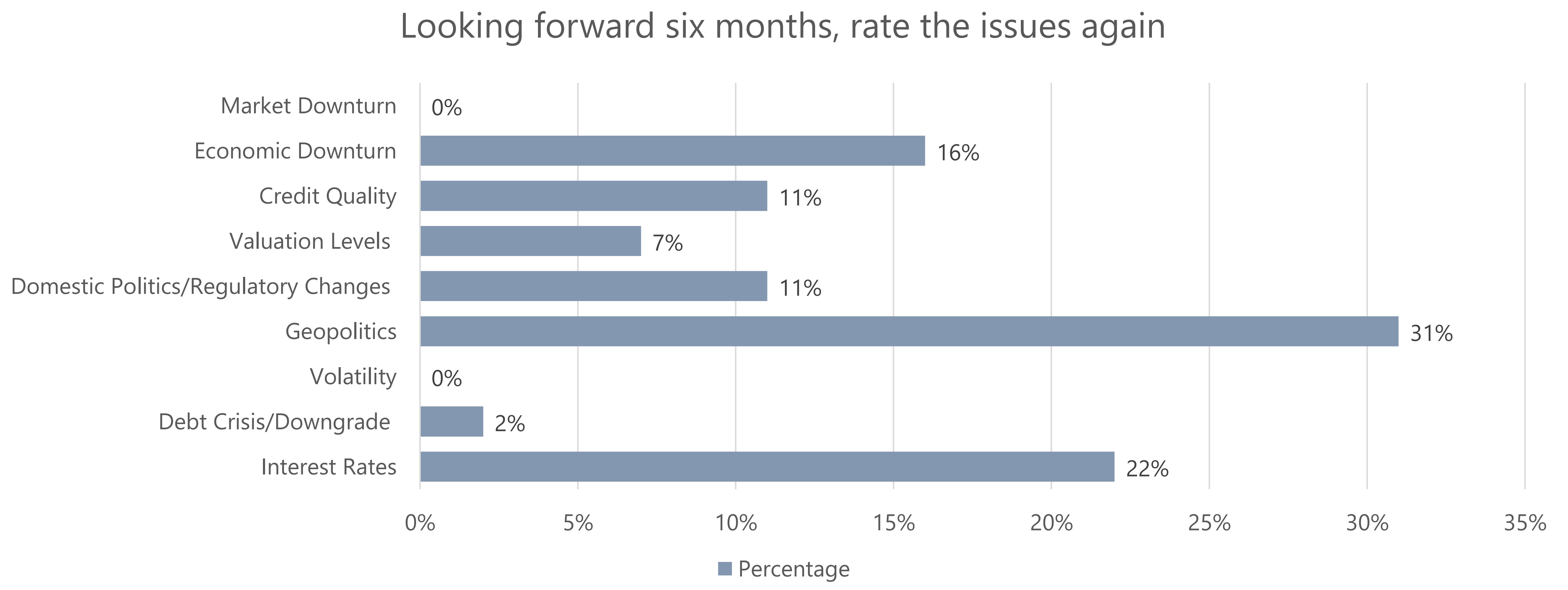


Alternatives

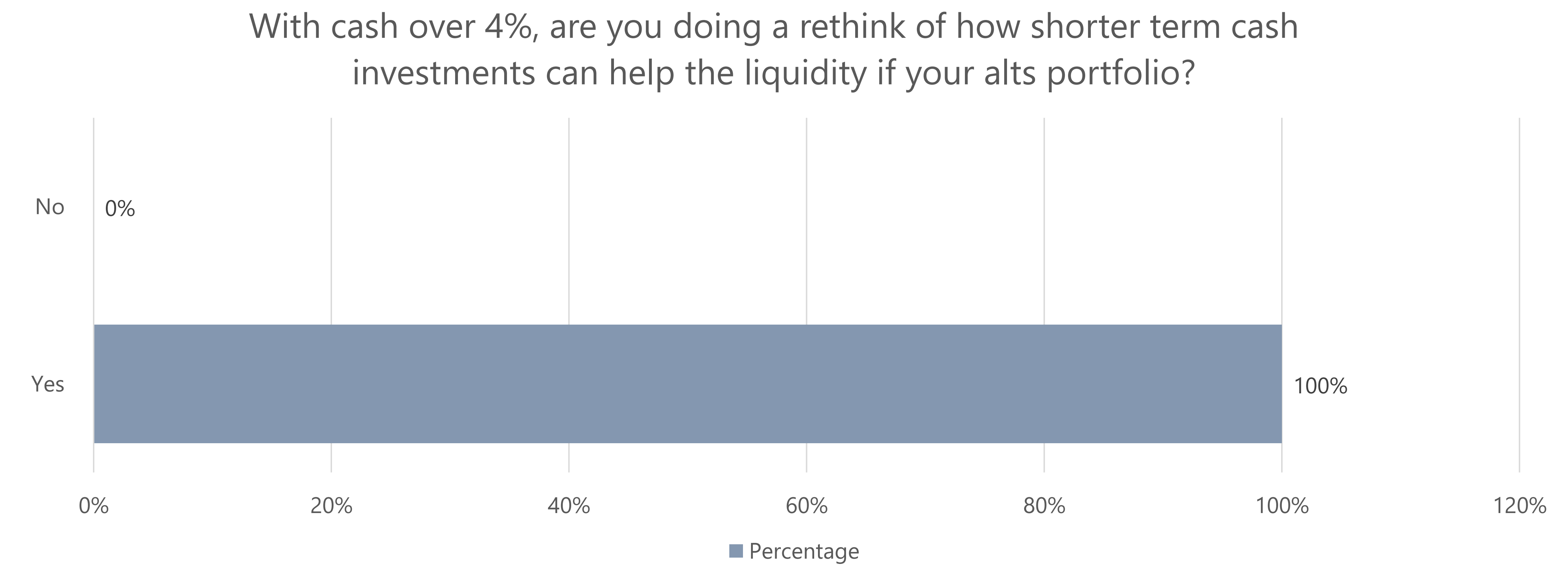
Geopolitics, Economic Downturn and Interest Rates Dominate Conversations



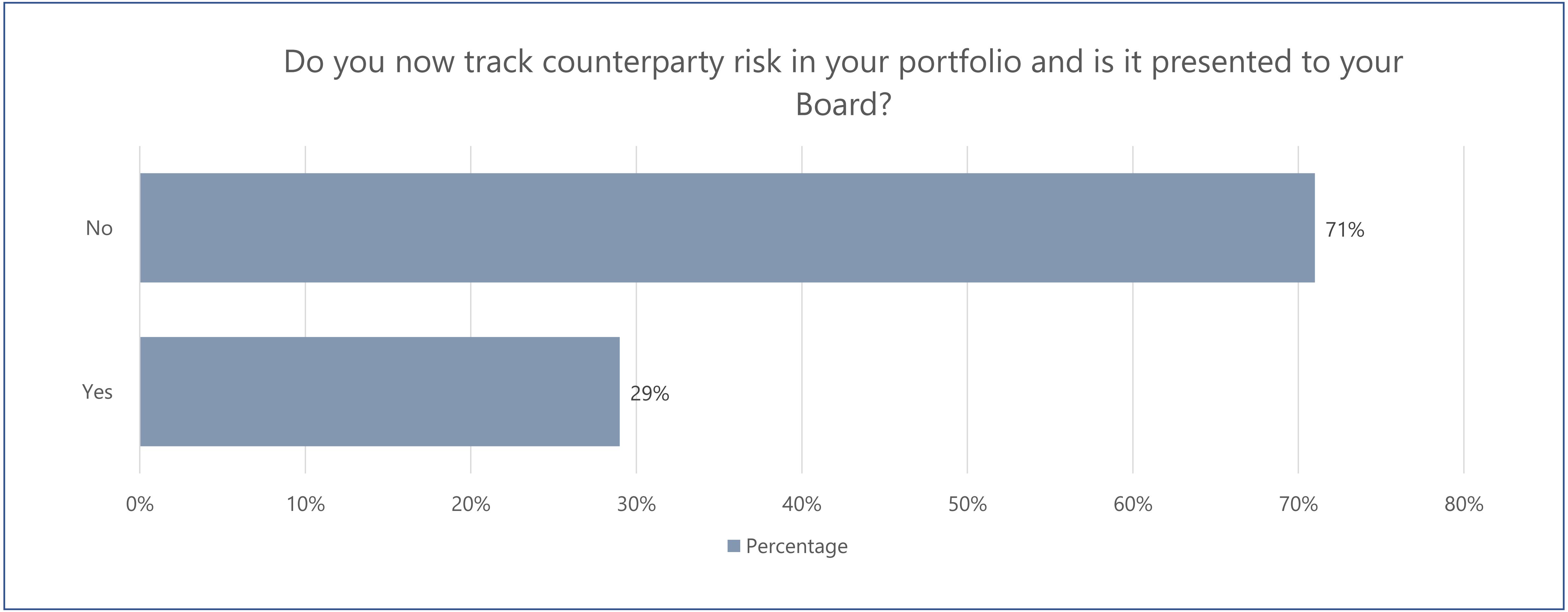
Increased Anticipation of Credit and Regulatory Risks, Coupled With Increased Expectations of Geopolitical Risk



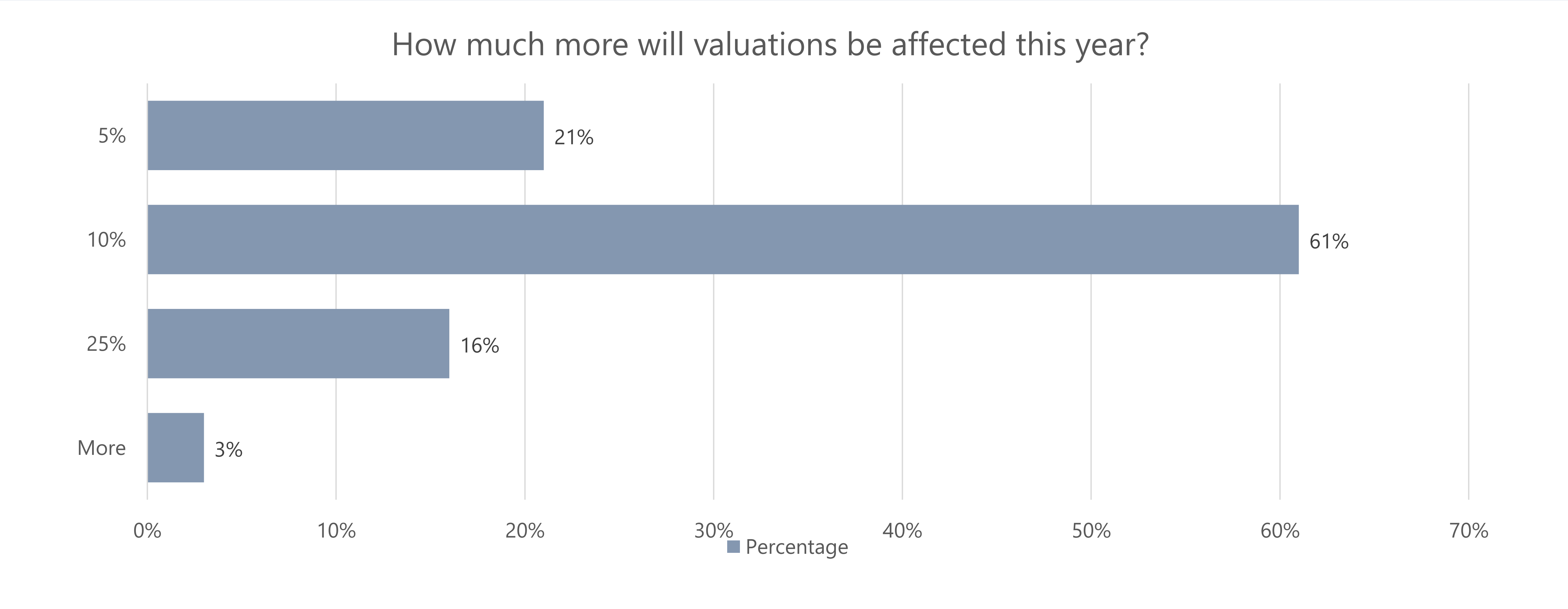
Rethinking The Use of Cash



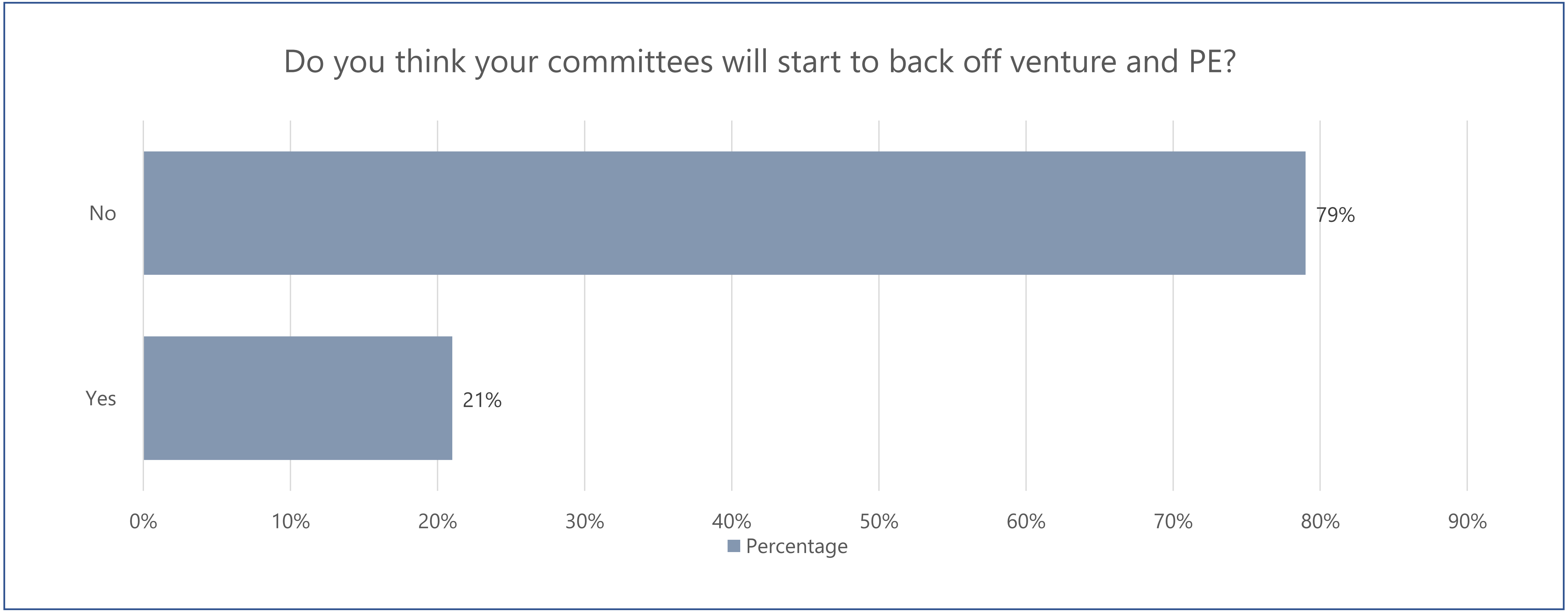
Minority Present Counterparty Risk to Board



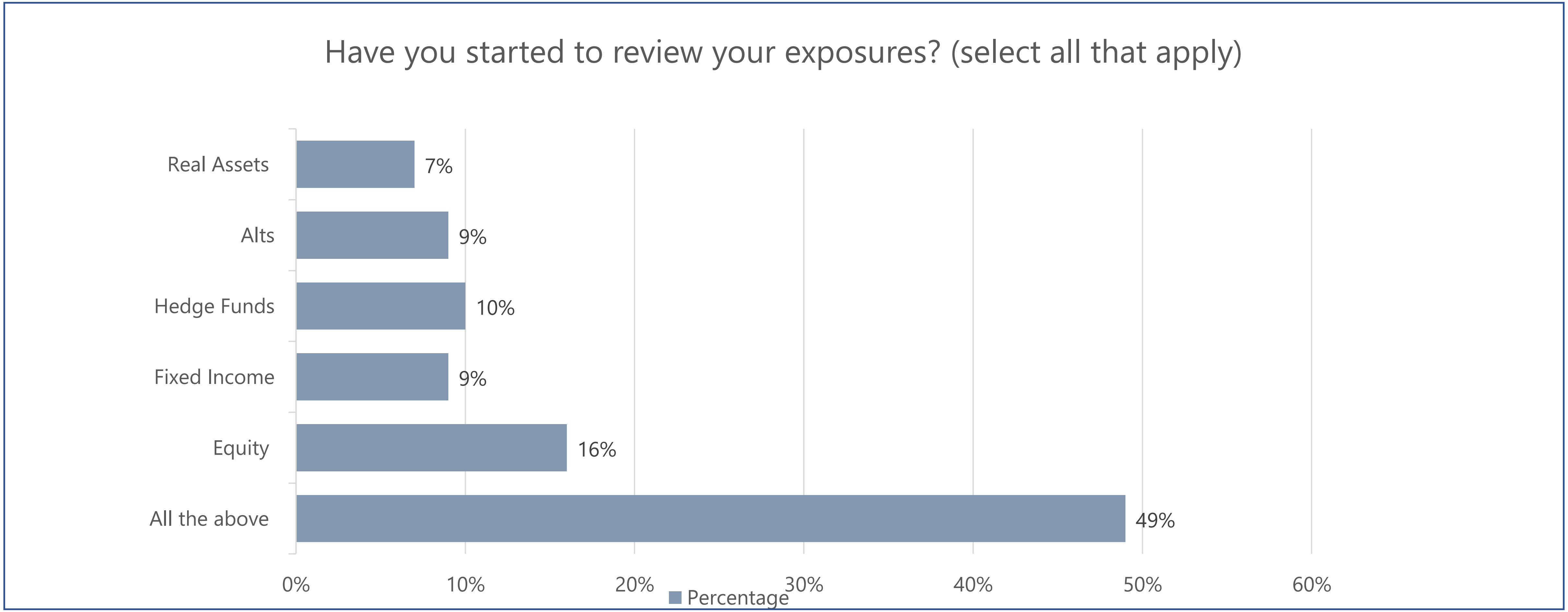
Predictions of 10% Declines In Valuations



Venture and Private Equity to Remain Scrutinised by Committees



Full Reviews of Portfolios and Their Exposures



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