Published on *University of Colorado* (https://www.cu.edu)

Frequently Asked Questions [1]

Q: What percentage of the University's Treasury Pool investments are in equities?

A: During the year, the equity allocation varies between 31% and 39% of the total portfolio.

Q: How does the Treasury Pool achieve market exposure to equities?

A: We achieve market exposure generally through the use of equity mutual funds. All equities are managed externally.

Q: What percentage of the Treasury Pool is managed inhouse?

A: Currently less than 1% of the portfolio. These are fixed income securities.

Q: Do you have any investment style preferences?

A: When investing in domestic large cap equities, we use an index fund. The University uses two managers each for its domestic mid-cap, global and international equity portfolios. For each of these strategies have both a value and a growth manager. The Small-cap manager favors value style.

Groups audience:
Treasurer

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