

LEELA FOUNDATION QUARTERLY REPORT

CALENDAR YEAR 2023 | QUARTER 1

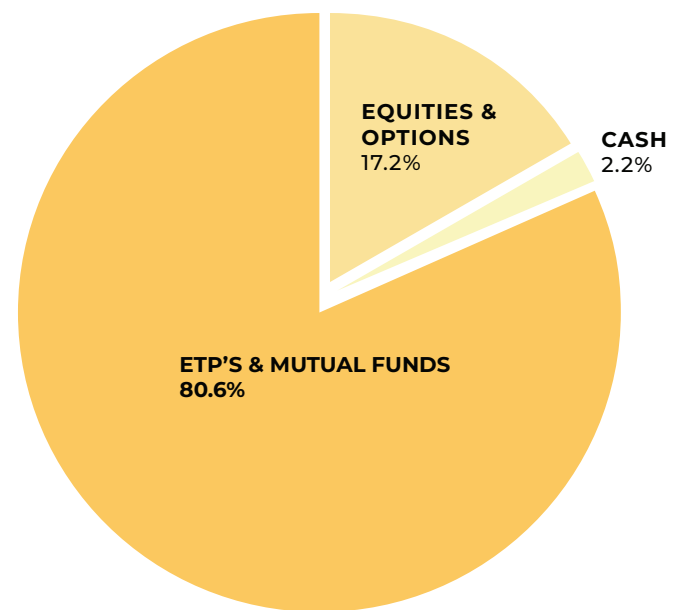
SUMMARY

Global equities gained in the first quarter of 2023, as recession worries receded in developed markets. Gains came despite the collapse of Silicon Valley Bank. Growth stocks outperformed value in the quarter and in fixed income, government bond yields fell. Amidst this context, the Leela endowment's market value increased, reporting a rate of return of 10.01%. The 2023 forecast for the endowment's performance is positive as markets stabilize and the endowment's investments continue to be diversified.

PORTFOLIO SNAPSHOT

JAN 1, 2023 - MAR 31, 2023		
NEW CONTRIBUTIONS	\$12,614	
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	DEC 31, 2022	MAR 31, 2023
AMOUNT INVESTED	\$779,616.69	\$937,143.10
CASH	\$91,666.00	\$21,342.83
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Q1 ANNUALIZED RATE OF RETURN	10.01%	

ASSET ALLOCATION



PORTFOLIO PERFORMANCE BY ASSET CLASS

