

Welcome

NEYM's Board of Managers
for Investment and Permanent Funds

Annual Sessions Meeting
Monday, August 3, 2020

Who we are

The Board of Managers of Investment and Permanent Funds is committee of New England Yearly Meeting and is responsible for management and investment, consonant with Friends principles, of Yearly Meeting funds and funds entrusted to it by meetings, schools, and other Friends organizations for the purpose of maintaining a source of continuing income and growth. The Board uses the services of a professional investment advisor and a sound bank as custodian for protection and safekeeping of the assets.

What we do

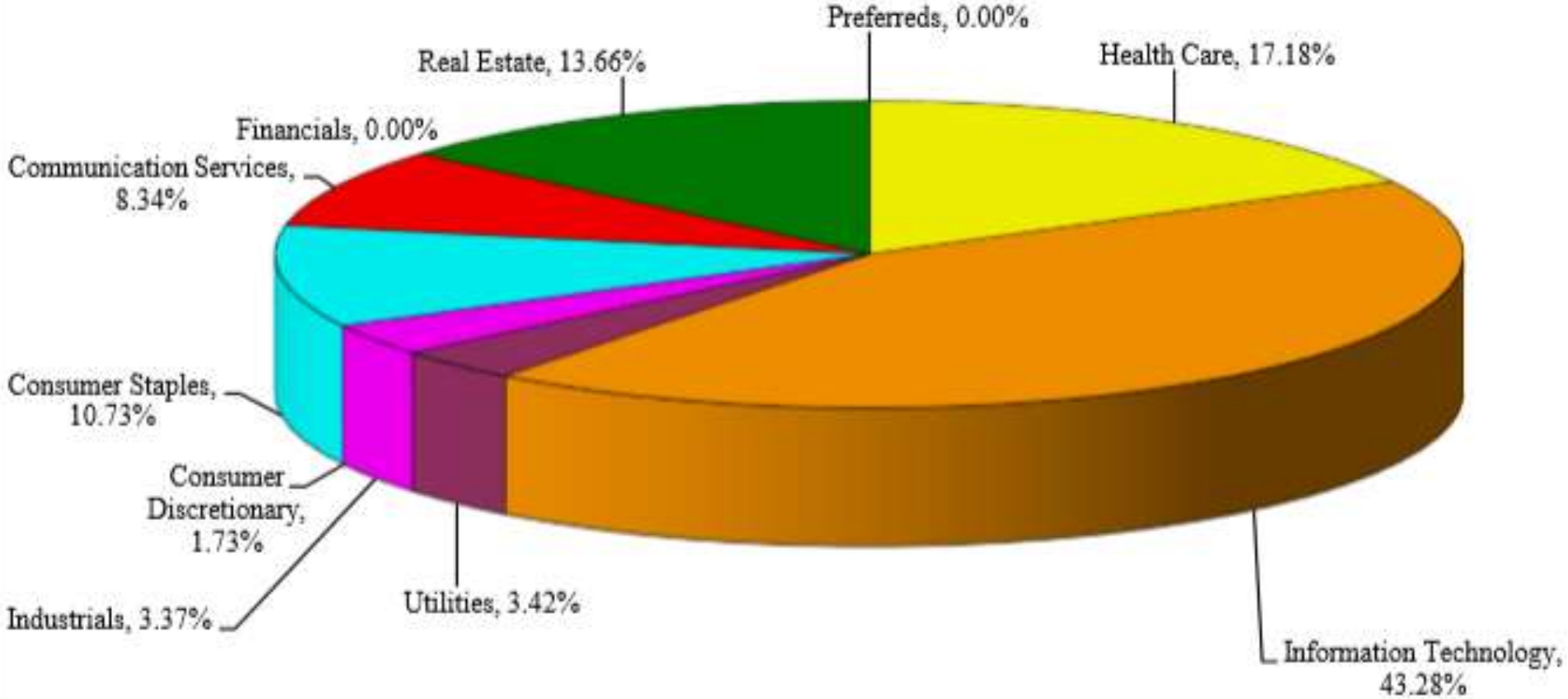
- *The purpose of the Pooled Funds is to provide an investment vehicle to New England Friends' organizations or to other organizations serving Friends' purposes which:*
 - Affirms Friends' testimonies;
 - Provides professional long-term investment management;
 - Distributes income quarterly; and,
 - Offers participation in a diversified portfolio to individual organizations that may not be able to achieve adequate diversification by investing their funds alone.

Performance through 6/30/19

PERFORMANCE THROUGH 6/30/20					
		Annualized			
	2020 YTD	1 Year	3 Years	5 Years	10 Years
NEYM Total Portfolio	2.62%	8.72%	10.48%	8.09%	9.18%
NEYM Equity Portfolio	6.16%	15.26%	16.01%	12.18%	14.05%
S&P 500	-3.08%	7.51%	10.73%	10.73%	13.99%
Barclays Gov/Credit	7.21%	10.02%	5.86%	4.74%	4.13%
FF Growth & Income Fund	-3.27%	3.44%	6.77%	6.95%	9.24%
FF Green Fund	-4.28%	1.89%	5.63%	5.48%	-

Performance reported before management fees.

Equity Holdings as of 6/30/20



How we invest

- The Board seeks companies that are making a positive contribution to the world's need for goods and services and are providing work in a healthy, equal opportunity environment.
- Furthermore, The Board of Managers avoids investments that are inconsistent with Friends' testimonies, including companies that depend upon war materials, alcoholic beverages, tobacco or gambling, and companies that conduct unfair employment practices or pollute the environment.

We review all investments

- Our equities review includes research on their standing with:
 - **Calvert US Large Cap Responsible Index Fund**
 - **Center for Political Accountability**
 - **Newsweek's Green Ranking**
 - **Carbon Disclosure Project**
 - **CSR Hub**
 - **Censible**
 - **Interfaith Center for Corporate Responsibility**
 - **Ethisphere Institute**
 - **Human Rights Campaign**
 - **Diversity Inc.**

Using our Quaker lens

- We look at equities for:
 - **Social responsibility**
 - **Political Accountability**
 - **Environmental impact**
 - **LGBTQ inclusion**
 - **Board diversity**
 - **Data privacy**
 - **Working environment and employee ratings**

BOM Meeting Schedule

2nd Wednesday of the month

1:45 pm

Meeting Date	Discussion
September 9, 2020	Quarter Two 2020
November 11, 2020	Quarter Three 2020
February 10, 2021	Quarter Four 2020
May 12, 2021	Quarter One 2021

Board of Managers Members

Name	Home Meeting
Roberta Chicos	Friends Meeting at Cambridge
Matthew Hackman	Providence Monthly Meeting
Ian Harrington	Friends Meeting at Cambridge
Edward Mair	Amesbury Monthly Meeting
Kathleen Malin, clerk	Smithfield Monthly Meeting
Jeanne McKnight	Wellesley Monthly Meeting
Erik Philbrook	Wellesley Monthly Meeting
Robb Spivey	Brunswick Friends Meeting
Shearman Taber, treasurer	Beacon Hill Friends Meeting
Joseph Tierney	Friends Meeting at Cambridge

We need you...

- Please let us know if you would be interested in serving on the BOM.
- We work with the Nominating Committee to find members.
- We are looking for your feedback.
 - Please let us know your thoughts on our communications and reporting
 - Our goal is to provide timely and helpful information to our constituents

For more information:

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Thank you!

- Please feel free to contact neympooledfunds@neym.org
- Visit the NEYM BOM website for our materials
- <https://neym.org/committees/board-managers>