

## **Welcome to OSU's Office of Investments**

The Ohio State University's Office of Investments was established in 2008 to ensure strategic management of the University's \$2.1 billion Long-Term Investment Pool. \* This diversified, multi-asset class portfolio supports Ohio State's student scholarships, academic and research programs, professorships, and libraries, to name a few of the many endowed fund initiatives.

The primary objective of the office is to optimize the endowment performance, including developing investment policies, strategic asset allocation targets, policy and performance benchmarks, and risk management practices. This ensures that the real purchasing power of the fund's principal is preserved and maintained enabling the University to continue to provide strong academic programs and innovative technology.

Building relationships with leading edge investment management organizations worldwide and identifying opportunities that lead to outstanding performance is another emphasis of the office.

The Office of Investments professional staff brings high ethical standards as well as years of experience, certifications and advanced degrees to making important investment decisions in accordance with policies established by the Board of Trustees' Investment Committee. The office also utilizes external investment managers in an effort to maximize investment returns while maintaining an appropriate level of risk.

The University presently ranks 31st among all universities based on asset size and 10th for public universities in the NACUBO 2008 National Endowment Study.

\*as of June 30, 2008

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### **What is The Long-Term Investment Pool?**

All endowed fund gifts at Ohio State are pooled together with other long-term university assets to form the Long-Term Investment Pool. This pool is broken down into these categories:

- University Endowment Fund  
Foundation Endowment Fund
- Long-Term Operating Pool

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### **Maintaining a Diversified Portfolio of Investments**

Within the Long-Term Investment Pool are well-diversified U.S. and International investments that include:

- Equities
- Fixed Income
- Real Estate/Natural Resources
- Private Equity
- Absolute Return/Hedge Funds

The pool operates similar to a mutual fund in that each named fund is assigned a number of shares of the Pool. New shares are issued monthly when gifts to new or existing endowed funds are received from University Development.

Funds are invested in a manner that provides the long-term growth necessary to preserve the value of these funds adjusted for inflation while making distributions to support the University's mission. Both the Office of Investments and the Investment Committee of the Board of Trustees closely monitor the performance of the endowment portfolio with re-allocation occurring as needed.

For questions about how the Endowment Fund is invested, please contact us at:

Office of Investments  
The Ohio State University  
1590 North High Street  
Suite 420  
Columbus, Ohio 43201  
Tel: 614-292- 7887  
Fax: 614-247-8878

### **[Staff Information](#)**

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#### **For more information**

You may obtain more information about the Endowment or details about your individual endowment fund by visiting:

<http://www.treasurer.ohio-state.edu/endowment/index.html>

For questions regarding expenditures from an individual named fund, or if you are interested in establishing an endowed fund contact University Development at 614-688-4501, (800) 327-7907 toll free or visit:

[www.giveto.osu.edu](http://www.giveto.osu.edu)