

Investing for the Future

Colorado PERA's overall approach to investment stewardship is straightforward: Seek out quality investments that are expected to provide the best risk-adjusted returns to PERA's portfolio over the long term. We break down this approach to financial sustainability into four parts.



PROTECT

Protect members' interests by watching costs

\$90,000

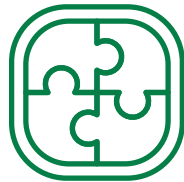
Savings by producing CAP fund fact sheets internally

0.31%

Cost to manage the Total Fund, or about \$3 of cost for every \$1,000 managed

\$65 Million

Savings by managing 62% of the Fund internally



INTEGRATE

Integrate relevant factors into PERA's investment strategy

~69,000

Proxy proposals voted in 2021

>220

Proposals seeking ESG disclosures voted in 2021

6.1 Million

Metric tonnes of carbon credits sold by PERA's timberland manager



ADVOCATE

Advocate for robust markets

\$74 Trillion

In assets under management by members of the primary advocacy groups in which PERA participates

~77%

Of eligible private fund advisory boards on which PERA staff serve

>35

Legislative and regulatory offices engaged on matters that can affect PERA and our members



EVALUATE

Evaluate exposures and recognize limitations

\$86 Billion

Generated by PERA's investments over the past 30 years

10.9%

Annualized 10-year net return on PERA's investments

13.3%

Annualized 5-year net return on PERA's investments