

THE UCONN FOUNDATION

ENDOWMENT REPORT 2025

BECAUSE
OF The Campaign
for UConn Nation
UCONN

Letter from the CFO

Your investment in UConn through the endowment is making a powerful and lasting impact. Thanks to your generosity and our disciplined investment strategy, the UConn Foundation endowment pool returned **8.2%** in **Fiscal Year 2025**, bringing the University's total endowment to **\$668 million** as of **June 30, 2025**. This strong performance continues to compare favorably with peer institutions and reflects the enduring value of your support.

Though markets briefly softened in early spring due to uncertainty around new federal tariff policies, public equities rebounded strongly by year-end, driven by solid economic fundamentals and corporate earnings. **Private equity returns were more modest**, reflecting a slower pace of deal activity and fewer exit opportunities. Still, we remain confident in the long-term value of private investments, which are essential to sustaining endowment growth—and your impact—over time.

The UConn Foundation's endowment pool is composed of many individual funds. These funds are invested in perpetuity, with annual income distributed to support the specific areas you care about most. This structure ensures that your gift continues to move UConn boldly into the future — year after year, generation after generation. While investment returns help preserve and grow the endowment, real (inflation-adjusted) growth is achieved through active philanthropic fundraising in close partnership with the University. Your continued support is essential to this effort.

As we advance the **Because of UConn** campaign, growing the endowment to **\$1 billion** is one of our highest priorities. Every dollar invested in the endowment helps fuel the University's mission of putting students first, elevating faculty excellence, supporting groundbreaking research, promoting sustainability, and cultivating a vibrant campus community.

We are grateful for your partnership and the impact you help us achieve. This fall, the University received a record 63,280 first-year applications. Together, we are ensuring that UConn remains a place where world-class scholars inspire students and drive innovation in Connecticut and around the globe. **The world moves forward because of UConn, and all we do is possible because of YOU.**

Thank you!



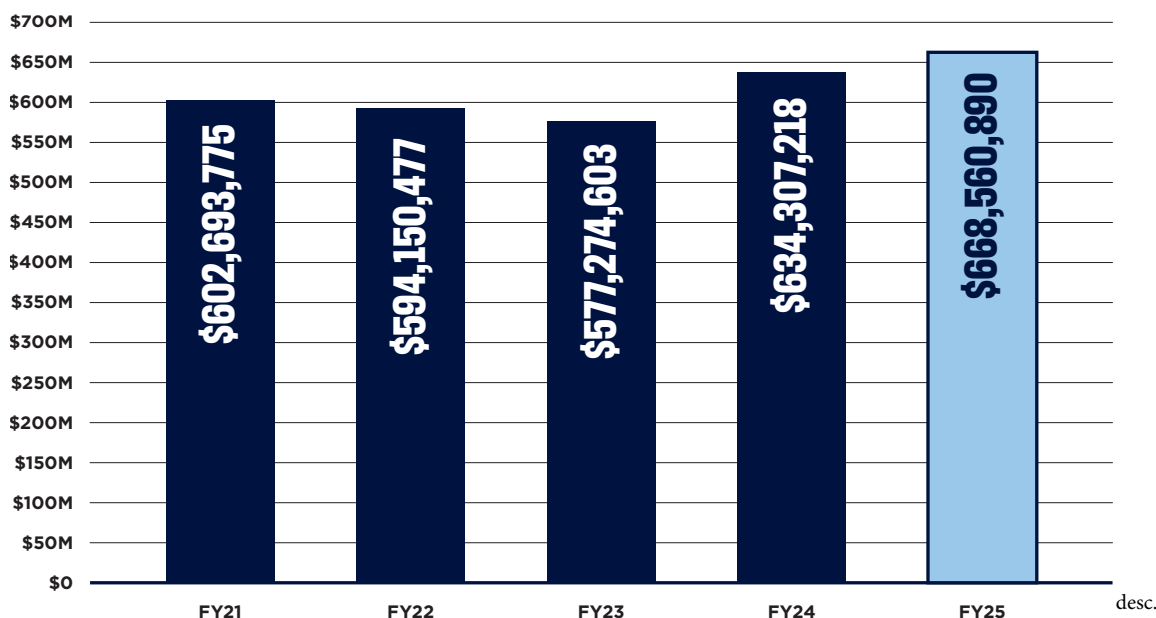
Dave Carney
Senior Vice President of Finance and Administration
and Chief Financial Officer

SUPPORTING THE UNIVERSITY'S MISSION

The UConn Foundation is pleased to raise, manage, and administer endowed funds in support of the University's mission. Growth occurs through the philanthropic fundraising and prudent investment management by a team of professional dedicated Huskies. In the midst of our historic \$1.5 billion campaign, *Because of UConn*, your investment increases student success while also elevating faculty, groundbreaking research, sustainability, and a thriving community that moves UConn boldly into the future.

Endowments are critical to UConn's success because they provide a stable and continuous source of funding to support its students, faculty, and community.

The world moves forward because of UConn, and all we do is possible because of YOU.

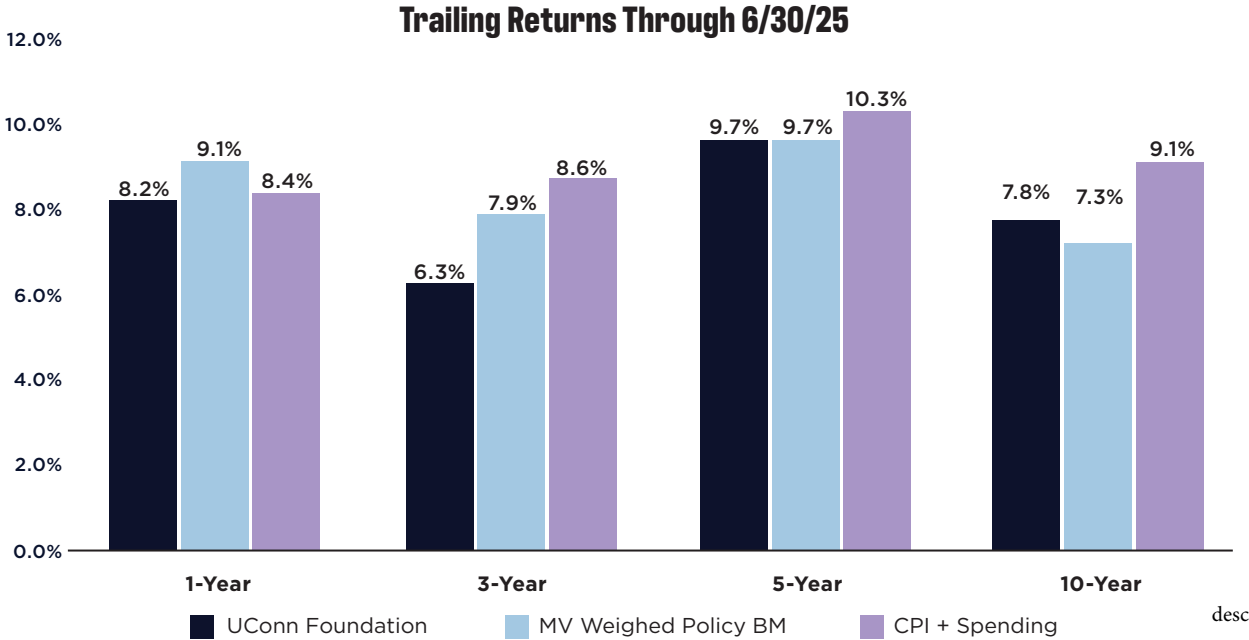


To secure a thriving future for generations of Huskies, the campaign targets four key pillars—each represented in the breakdown of endowment dollars shown below:

<p>Students First \$249,573,211 Creating opportunities for transformative education through scholarships, wellness and life skills, and academic success for every student.</p>	<p>Health & Wellness of People & Planet \$123,216,038 Focusing on patient care, medical research, and the development of life-changing technologies that improve healthcare outcomes and create a sustainable future.</p>
<p>Academic & Innovation Excellence \$231,299,728 Driving investment in top faculty, students, and the innovation and research ecosystem that fuels Connecticut and the world.</p>	<p>Husky Pride \$64,471,913 Investing in athletic excellence and engaging a thriving UConn Nation of more than 290,000 alumni worldwide.</p>

MOVING FORWARD

Based on the 2024 results of the annual survey of over 650 college and university endowments to benchmark performance, asset allocation, and other metrics, our endowment returns were in the top quartile among these peers for the trailing 3- and 5-year periods, and in the second quartile for the trailing 1- and 10-year periods. The endowment is young, about half the age of most peers and close to a century younger than some. Despite our relative age, we are performing competitively against our longer-established peers—the endowment size was recently ranked 71st among 239 public universities and is targeted to grow to over \$1 billion under our recently launched *Because of UConn* campaign.



Competitive Investment Performance Among Peers

Investment returns have consistently ranked highly vs. peer institutions*

Trailing 1 Yr.	Trailing 3 Yrs.	Trailing 5 Yrs.	Trailing 10 Yrs.
2nd Quartile	1st Quartile	1st Quartile	2nd Quartile

*Source: 2024 NACUBO-Commonfund Study of Endowments

For more information visit s.uconn.edu/endowment



YOUR SUPPORT MATTERS

Join Us



Because.UConn.edu



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