Our Mission: Unite donor passions with university priorities to elevate the impact of OSU

Endowment Report 2022-2023

>88% of students rely on financial assistance

$30.5M total spending available to OSU in FY23

+7.68% investment return

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YOUR IMPACT

Thank you! Your investment allows OSU to continue impacting the world by providing a quality education to leaders of tomorrow. Endowed gifts are vital to OSU's long-term success because they provide a consistent, reliable source of support each year. Last year, OSU received $30.5 million in spending from endowments – thanks to our dedicated donors. As OSU’s endowment grows, so does our ability to promote knowledge, enrich lives and stimulate economic development. Our students and faculty rely on your generous support to advance OSU’s land-grant mission through teaching, research and outreach. Together, we are creating a brighter ORANGE future.
Scholarships help offset the increasing cost of higher education and provide hope for a brighter future to students across the OSU System. This graph represents the increase in OSU scholarships awarded over the past decade. Need-based scholarships remain the university’s top fundraising priority. To learn more visit OSUgiving.com.

A goal of the Pooled Investment Fund is to achieve investment performance that supports stable annual spending policy distributions to OSU. The spending policy amount is reviewed regularly by the Investment Committee and approved by the Foundation Board of Trustees. The policy was revised in FY17 with changes effective in FY19. For more information visit OSUgiving.com/endowments.

Endowment gifts for the benefit of Oklahoma State University (OSU) are placed in the Pooled Investment Fund (PIF). The OSU Foundation Board of Trustees and its Investment Committee have adopted an investment strategy to preserve the long-term purchasing power of the endowments while prudently managing risk. The portfolio is overseen and managed by Multilateral Endowment Management Company (MEMCO), which the Board of Trustees established in June 2019 to manage the OSU Foundation’s investments. The PIF delivered +7.7% in FY 2023, as public equity markets recouped losses from their FY 2022 drawdown. MEMCO and the Investment Committee remain committed to maintaining a diversified portfolio that exhibits significantly less risk than global equity markets. It is our view that a properly constructed, risk-controlled portfolio is able to achieve long-term equity-like returns with less risk of significant drawdowns, ultimately providing consistent support to OSU. For more information about MEMCO, visit OSUgiving.com/endowments.

The Investment Policy Benchmark (IPB), which is approved by the Investment Committee, is a passive, non-investable portfolio, representative of the exposures and risk level in the PIF, and is used to measure the value added by active management. After delivering strong outperformance in FY 2022, the PIF lagged the IPB, which earned +13.7% in FY 2023. Despite the modest underperformance this year, as shown in the graph above, the PIF has generated strong excess returns over longer periods.
Balances reflect final capital statements and estimates received as of 8/28/2023. Gross exposures are >100% due to the use of equity futures, which are not fully collateralized.

Please see the back of your endowment reports for a glossary of terms.