

MONTHLY REVIEW

09



Making a difference in two very different ways

At the time of writing this, Auckland is heading into its 7th week of Covid-19 restrictions. Whilst Aucklanders can now enjoy a takeaway and a walk in the park, many businesses and in turn their employees, are being impacted financially. It was therefore incredibly rewarding to be in a position to help to make a difference for Auckland families doing it tough by partnering with three Auckland foodbanks working tirelessly to deliver food and household essentials to those who need it.

September also saw us partner with the Sunday Star Times Short Story Awards for 2021. In its 38th year alongside Penguin Books, these awards are among New Zealand's most prestigious and established writing prizes and have helped launch the careers of many well-

known writers. We are delighted to have helped reinvigorate the awards by broadening the categories to include best emerging Pasifika writer alongside the category of best emerging Maori writer. The projects aligns perfectly with the Foundation's clear purpose 'to invest in the future of New Zealand' and has enabled us to be part of something positive and uplifting in what is proving to be very challenging times for our young people.

All the best

Bryce Marsden
Chief Executive



Events October

0800 What's Up? Celebrates its 20th Anniversary

This incredible service celebrates 20 years in New Zealand. With more than 12,700 calls and chatters received last year, we are proud to continue our partnership with the only dedicated child and youth helpline in Aotearoa.

Money growing to be granted

\$5,255K

A difficult month for the portfolio but economies and markets since it's inception have been very solid. There are still reasons to be optimistic with unemployment levels low and global consumers have a significant store of savings. The Portfolio will look for opportunities to increase exposure to growth assets, whilst being careful to guard against the risk of further volatility in markets.

Money granted to date

\$860K

Graeme Dingle Foundation Kiwi Kaha programme **\$345,000** to 2023
 Banardos 0800 What's Up? **\$345,000** to 2023
 Manukau Urban Maori Authority **\$40,000**
 The Fono's Felelko Food-Hub **\$40,000**
 The Village Community Services Trust **\$40,000**
 Graeme Dingle Foundation Career Pathways Programme Pilot **\$50,000**



Our Partners



Highlights of September 2021

After providing grants to three charities, we were thrilled to hear how this has helped to feed over **1,283** families in need! We were able to help MUMA support 533 families, The FONO with food for 300 families, and The Village with 500 food parcels to 450+ families. The need is an ongoing one though.

Our vision is to create a sustainable future for communities within Aotearoa, and to create opportunities for generations to follow. However, in order to make this happen, we must urgently solve the pressing issue in front of us now - putting food on the table for those who need it the most.

Manukau Urban Maori Authority
www.muma.co.nz

The Fono's Felelko Food-Hub,
www.thefono.org

West Auckland-based The Village Community Services Trust
www.villagetrust.co.nz

\$40K

\$40K

\$40K

Investment Performance

to 30 September 2021

| | 1 Month | 3 Months | Since Launch |
|--------------------------------|---------|----------|--------------|
| Capital Portfolio ¹ | -1.21% | 2.86% | 10.47% |
| Grants Portfolio ² | 0.06% | 0.17% | 0.31% |

- Held in a selection of Milford Funds providing a Balanced Growth strategy since 22 March 2021.
- Held in the Milford Cash Fund (A mix of cash and cash equivalents) since 11 February 2021. No performance or management fees are charged on these Portfolios

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