Balancing risk and return: How not-for-profits are structuring their portfolios in 2025

By Perpetual Private

29 October 2025



Whether your organisation is already invested or considering options beyond cash and term deposits, understanding how other not-for-profits approach portfolio construction can provide food for thought for your own investment strategy discussions.

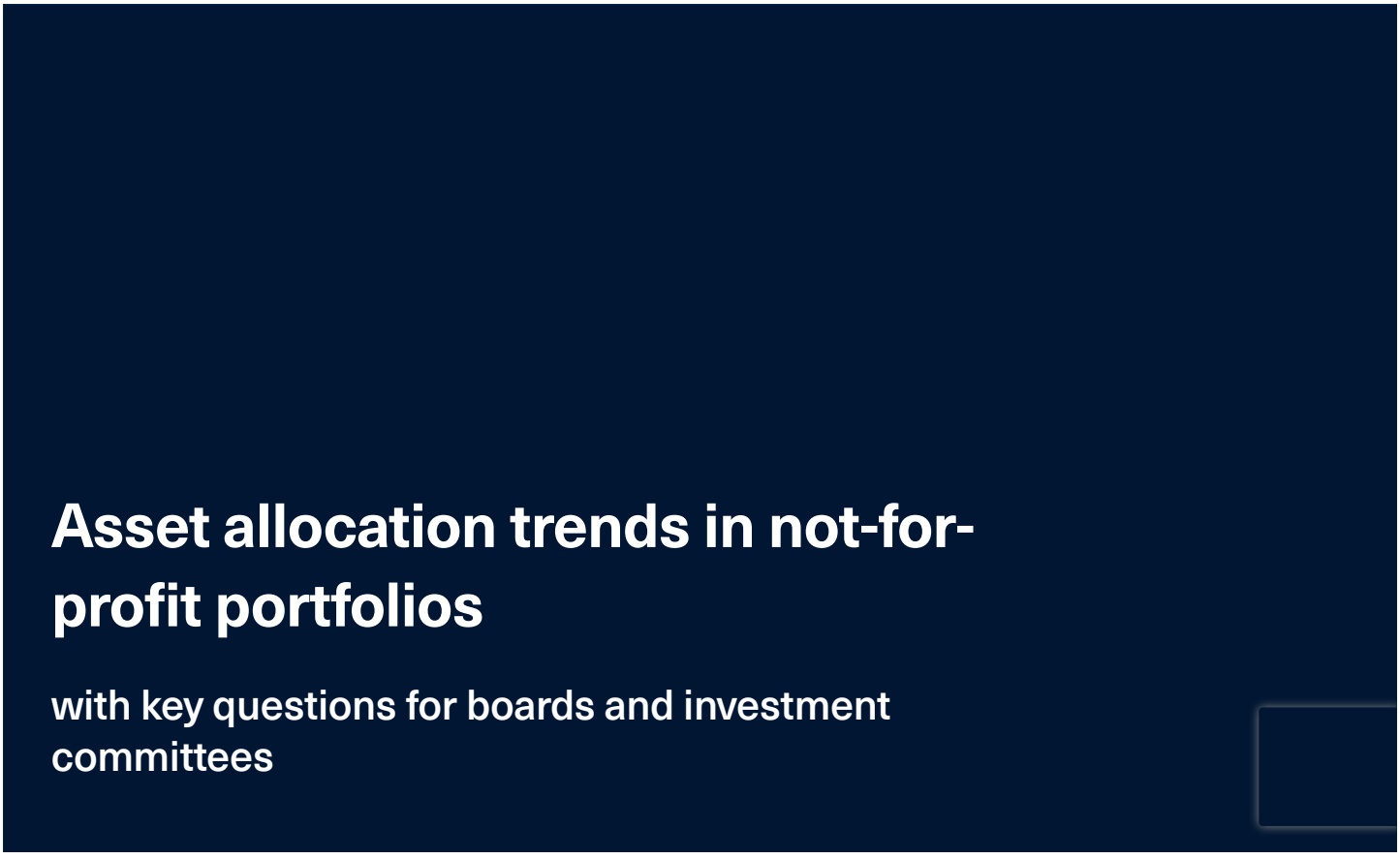
Over the past four years we have investigated how different not-for-profit organisations in our client base think about risk and return and how that has played through into portfolio construction.

Download paper

This paper covers:

- Analysis of 221 not-for-profit portfolios with $3 billion under management
- How objectives shape asset allocation decisions
- Shifts in growth and defensive asset weightings
- Trends in home bias and international diversification
- The increasing role of alternatives
- Four key questions for boards and committees to consider as part of investment strategy discussions

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