

Contact: John Campagna

***FOR IMMEDIATE RELEASE***

Phone: 410 878-7084

Mobile: 410 303-8156

Fax: 410 243-2115

Email: [campagna@benchmarkam.com](mailto:campagna@benchmarkam.com)

**BENCHMARK ASSET MANAGERS  
CONTINUES TO MAINTAIN CLIENTS' PORTFOLIO VALUE**  
Combined Client Composite Portfolio only down 2.8% for Q1 2009

Benchmark demonstrated during the market tumult the effectiveness of combining socially responsible & sustainable investing with modern portfolio management. Continuing our success from 2008 (where our client composite return was down only 5.1%) Benchmark clients on average preserved capital in a very difficult environment during Q1 2009.

	<u>Q1 2009</u>	<u>YTD</u>	<u>1 Year</u>	<u>3 Years</u>
<b>Benchmark Client Composite*</b>	<b>-2.8%</b>	<b>-2.8%</b>	<b>-8.1%</b>	<b>1.9%</b>
Default 60/40 Blended Indices **	-7.1%	-7.1%	-22.5%	-4.7%

***Benchmark's investment stewardship has added approximately 14% in total return during the past year.*** We did this by focusing on:

1. *Rigorous risk management* combined with forward looking asset allocation. We allocate client assets based on long term mean-reversion analysis, not just on recent returns.
2. *Low cost solutions* such as indexing for efficient markets (i.e., large cap equities), using in-house research and asset management, and maintaining low management fees.
3. *Full commitment to social responsible and sustainable investing* across all asset classes. We take advantage of substantial in-house social and environmental research to invest in companies that demonstrate strong management and long term perspective.

In light of Benchmark's continuing success we will be partnering with the **Rockefeller Philanthropy Advisors** to showcase how foundations can apply these principles to their Mission Related Investing strategies. First events will be held in Baltimore (May 21<sup>st</sup>).

*\*The Benchmark Asset Managers LLC Client Composite is the total time-weighted return (cap weighted), net of fees, of all client portfolio's managed by Benchmark Asset Managers LLC. Returns are calculated monthly. Before January 2008 returns were calculated quarterly.*

*\*\*Traditional 60/40 portfolio defined as:*

*35% US Large Cap (Domini 400), 10% US Small Cap (Russell 2000), 15% Large Cap International (EAFE), 30% US bonds (Barclay Intermediate Gov/Credit Index) & 10% Cash (3 Month T-Bill).*