



Orange County Sanitation District

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Agenda Report Details (With Text)

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Title: INVESTMENT PERFORMANCE RESULTS

Sponsors: Lorenzo Tyner

Indexes:

Code sections:

Attachments: 1. Agenda Report, 2. Chandler Asset Management Presentation

Date	Ver.	Action By	Action	Result
2/8/2023	1	ADMINISTRATION COMMITTEE		

FROM: James D. Herberg, General Manager
Originator: Lorenzo Tyner, Assistant General Manager

SUBJECT:

INVESTMENT PERFORMANCE RESULTS

GENERAL MANAGER'S RECOMMENDATION

RECOMMENDATION:

Information Item.

BACKGROUND

Chandler Asset Management (Chandler) serves as the Orange County Sanitation District's (OC San) Investment Manager. Chandler's Co-Chief Investment Officer, William Dennehy II, CFA, will be providing an informational presentation on the performance of OC San's liquidity and long-term investment portfolios over the past year.

RELEVANT STANDARDS

- Ensure that investment proposals and decisions are based on clearly defined standards
- Comply with OC San's Investment Policy
- Ensure the public's money is wisely spent

ATTACHMENT

The following attachment(s) may be viewed on-line at the OC San website (www.ocsan.gov) with the complete agenda package:

- Presentation