

NORTH CAROLINA  
DEPARTMENT OF STATE TREASURER



BRADFORD B. BRINER  
STATE TREASURER OF NORTH CAROLINA

## Potential Future Agenda Topics

Investment Advisory Committee

February 26, 2025



## Potential IAC Annual Cycle of Agenda Topics

May 2025

- Private Asset Pacing Review (Private Equity, Real Estate, Opportunistic Fixed Income, and Inflation Sensitive)

August 2025

- Asset Liability Study – Methodology and Risk Appetite
- Governance Study
- Asset Class Reviews (e.g., Real Estate and Private Equity)

November 2025

- Asset Liability Study – Model Portfolios and Analysis
- CEM Cost Efficiency Analysis
- Asset Class Reviews (e.g., Investment Grade Fixed Income and Opportunistic Fixed Income)

February 2026

- Asset Liability Study – Recommendations and Transition Plan
- Asset Class Reviews (e.g., Multi-Strategy, Public Equity, Inflation Sensitive)

**Note: Initiatives Update and Performance Review will be on the agenda for each regular meeting.**