PERSPECTIVE DATA SCIENCE

AI Insights Report

Marist University, NY
Report Type: standard

Report Generation Date: May 05, 2026

Background Information

Marist University is a private, not-for-profit institution located in Poughkeepsie, New York, that offers degrees up to the doctoral level. Classified as a Master's College & University, the school serves a full-time equivalent undergraduate enrollment of 5,158, alongside 738 graduate and 96 professional students. To support its residential community, the university provides institution-controlled student housing with a capacity of 3,465, fostering a comprehensive academic environment for its diverse student population.

Executive Summary

Marist University exhibits a fortified financial position relative to fiscal year 2016 baselines, characterized by exceptional growth in liquid assets and net worth. Unrestricted net assets excluding property, plant, and equipment (UNREP) more than doubled from approximately $200 million in 2016 to surpass $500 million by 2025, significantly outpacing peer medians and indicating strong liquidity. This financial stability is reinforced by cash and investment reserves that increased by over 100% relative to 2016 levels, reaching approximately $660 million, and maintaining a cash-to-operating expenses ratio above 2.6 from 2021 onward. Furthermore, the endowment value grew by over 800% relative to the 2016 baseline by 2025, supported by a conservative management strategy where appropriation rates remained below 1% from 2020 onward, indicating sustainable investment growth rather than reliance on drawdowns to support operations.

The institution maintains strong profitability and revenue generation capabilities, diverging positively from comparison groups that experienced negative margins. By 2025, Marist retained an adjusted net income margin of approximately 6-7%, while peer medians fell into negative territory. This stability is underpinned by adjusted operating revenue growth of roughly 35% relative to 2016 levels, which closely tracked total operating expenses that rose nearly 40% relative to 2016 levels. Net student revenues remained positive throughout the period, peaking at over 20% growth relative to 2016, contrasting with peers who saw declines between 2020 and 2022. Additionally, private gifts and grants for operations surged to over $12 million in 2025, exceeding comparison group medians, while debt intensity, which spiked in 2022, declined sharply through 2025 despite remaining higher than benchmarks.

Operationally, Marist demonstrates enrollment resilience and a distinct cost structure that warrants attention regarding vendor reliance. Full-time equivalent student enrollment increased by more than 5% relative to 2016 levels by 2025, contrasting with a contraction among peers. While salary and wage costs per million dollars of revenue dropped significantly to remain below peer medians, the intensity of fees for services consistently exceeded both comparison and national medians, reaching over $80,000 per million dollars of revenue in 2024. This elevated spending on external vendors and contractors suggests the institution is spending more than normal on vendors, which may be straining the operating budget and causing financial stress despite the current low labor cost metrics.

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Key Metrics

Metric	2021	2022	2023	2024	2025	mean	pct_change
Total Net Assets ($millions)	742.0	718.09	761.6	830.42	890.44	788.51	20.01
Unrestricted Net Assets ($millions)	629.33	614.36	650.42	707.71	758.5	672.06	20.52
UNAEP ≈ liquid unres. net assets ($millions)	375.78	428.2	449.2	475.04	505.11	446.67	34.42
Adjusted Operating Revenue ($millions)	217.9	236.81	239.15	246.45	261.37	240.34	19.95
Total Operating Expenses ($millions)	183.97	202.74	214.76	225.42	244.51	214.28	32.91
Adjusted Net Income	33.93	34.07	24.39	21.03	16.86	26.06	-50.3
Adjusted Net Income Margin (%)	15.57	14.39	10.2	8.53	6.45	11.03	
FTE Students (count)	6085.0	5959.0	6082.0	5992.0	6093.0	6042.2	0.13
Net Student Revenues [NTR+AUX] ($millions)	185.05	193.86	203.23	207.03	214.75	200.78	16.05
CAPEX to Depreciation Ratio (ratio)	0.24	0.21	1.18	2.63	1.14	1.08	
Cash and Investments ($millions)	511.19	547.16	596.07	632.11	660.8	589.47	29.27
Cash and Investments to Operating Expenses (ratio)	2.78	2.7	2.78	2.8	2.7	2.75	-2.74
Cash and Investments to Total Debt (ratio)	2.77	2.32	2.66	2.87	3.21	2.76	15.83
End of Year Endowment Value ($millions)	416.68	378.02	412.13	468.28	517.85	438.6	24.28
Endowment Approp. as % of BOY Value (%)	0.51	0.56	0.67	0.54	0.81	0.62	

*** Adjusted Operating Revenue is Unrestricted Operating Revenue - Endowment Appropriation + 0.045*Endowment Value at the Beginning of the Fiscal Year.
*** Adjusted Net Income is Adjusted Operating Revenue - Total Operating Expenses.
*** Adjusted Net Income Margin is (Adjusted Net Income / Adjusted Operating Revenue)*100.

The Key Metrics table includes a range of measures that highlight the financial position and operating performance of the school over the last five years. The peer group graphs below highlight these and other measures over the last decade.
In the Mean and Pct Change columns the red highlighted cells generally indicate negative performance. The Pct Change in Total Operating Expenses is presented neutrally. The mean of the Capex to Depreciation Ratio is highlighted in red if the value is below 1. The Endowment Approp. as % of BOY Value (%) is highlighted in red if the value is above 4.5%. Values are omitted where there is no relevant Pct Change.

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Comparison Group

Fairfield University, CT (Peer type: DC)	Ithaca College, NY (Peer type: DC)
Monmouth University, NJ (Peer type: DC)	Bentley University, MA (Peer type: DC)
Loyola University Maryland, MD (Peer type: DC)	University of Scranton, PA (Peer type: DC)
Saint Joseph's University - Philadelphia, PA (Peer type: DC)	Manhattan University, NY (Peer type: DC)
Bryant University, RI (Peer type: DC)	Le Moyne College, NY (Peer type: DC)
Springfield College, MA (Peer type: DCxDC+SR)	Canisius University, NY (Peer type: DCxDC+SR)
St Bonaventure University, NY (Peer type: DCxDC+SR)	Butler University, IN (Peer type: DCxDC)
Suffolk University, MA (Peer type: DCxDC)	Fairleigh Dickinson University-Metropolitan Campus, NJ (Peer type: DCxDC)
Gannon University, PA (Peer type: DCxDC)	La Salle University, PA (Peer type: DCxDC)
Niagara University, NY (Peer type: DCxDC)	St. John Fisher University, NY (Peer type: DCxDC)
Siena College, NY (Peer type: DCxDC)	University of Mount Saint Vincent, NY (Peer type: DCxDC)
Robert Morris University, PA (Peer type: DCxDC)	Iona University, NY (Peer type: DCxDC)
Creighton University, NE (Peer type: DCxDC)	Stonehill College, MA (Peer type: DCxDC)
Muhlenberg College, PA (Peer type: DCxDC)	Manhattanville University, NY (Peer type: DCxDC)
Sacred Heart University, CT (Peer type: DCxDC)	Saint Michael's College, VT (Peer type: DCxDC)
St. John's University-New York, NY (Peer type: DCxDC)	

Peer types
• DC — double-confirmed peer
• DCxDC — double-confirmed peer of double-confirmed peer
• DCxDC+SR — double-confirmed peer of double-confirmed peer also self-reported
• RB — reported by peer institution
• SR — self-reported only

Peer types are constructed from the lists of comparison schools that institutions self report in their IPEDS Data Feedback Report (nces.ed.gov/ipeds/help/data-feedback-report). These lists reflect how colleges and universities identify their own peer sets for benchmarking.

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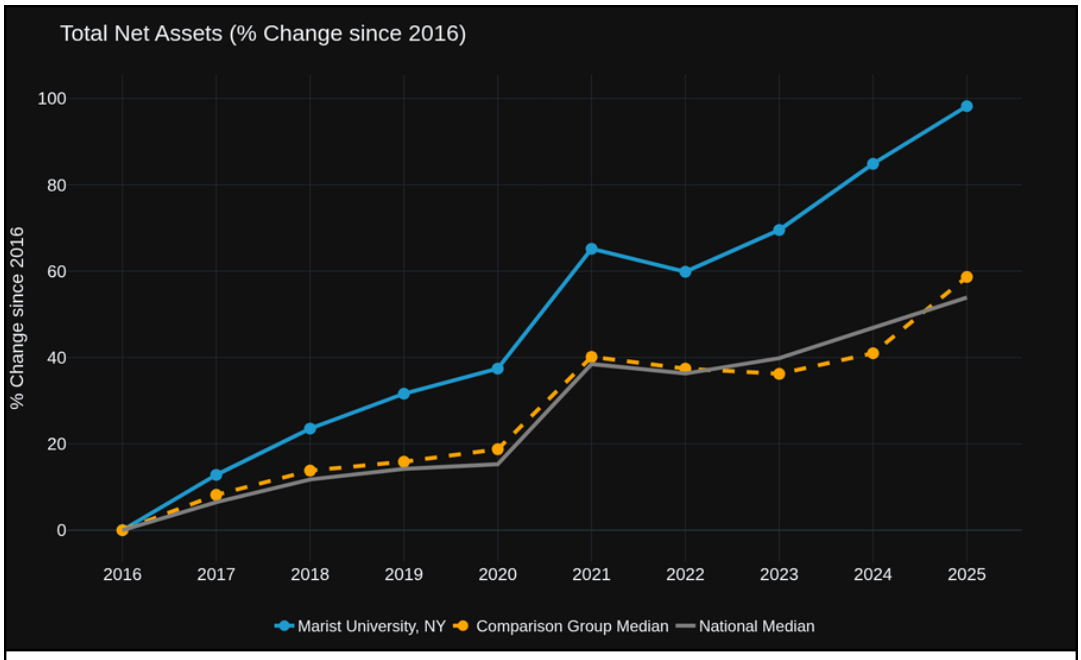
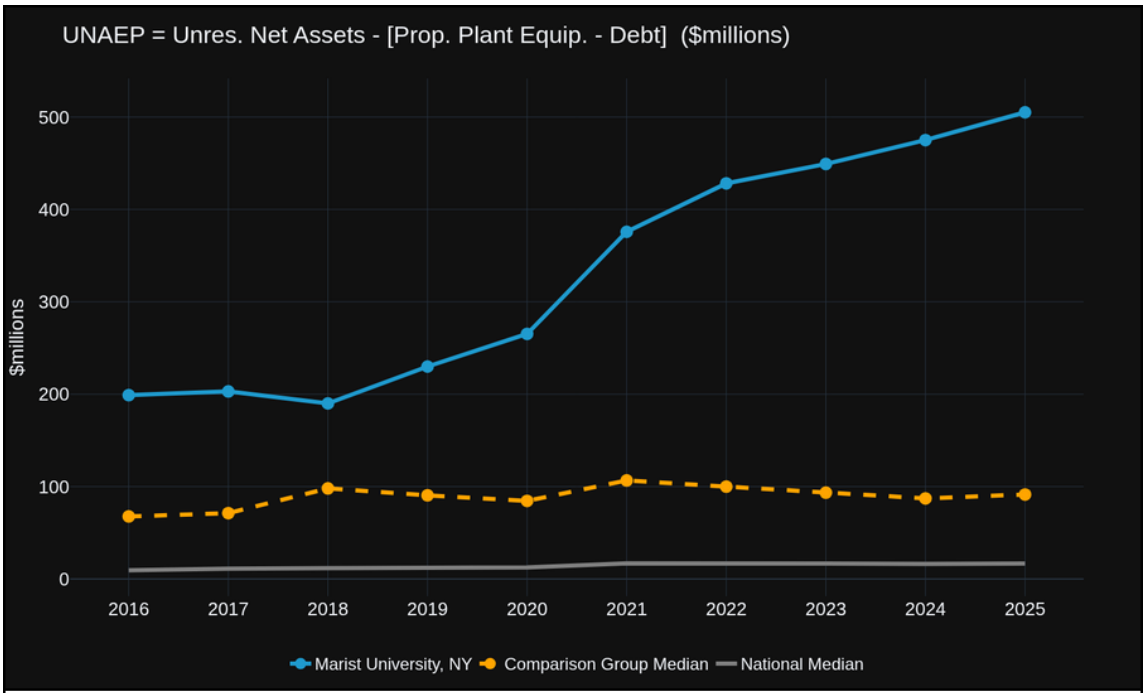


Marist University, NY consistently demonstrated the highest percentage growth in Total Net Assets relative to its 2016 baseline, remaining significantly above both the Comparison Group Median and the National Median throughout the entire timeline. Although all three groups experienced a sharp spike in growth in 2021 followed by a slight decline in 2022, Marist's trajectory diverged sharply upward afterward, reaching nearly 100% change by 2025. Meanwhile, the Comparison Group Median and National Median tracked closely together with more moderate growth, ending the period near 60% and 55% respectively. The gap between Marist and the other benchmarks widened considerably after 2020, highlighting a sustained and accelerating difference in asset growth relative to the 2016 starting point.



Marist University's UNREP metric, measured in raw millions of dollars, began at approximately $200 million in 2016 and experienced significant growth, surpassing $500 million by 2025. Throughout the entire period, Marist remained substantially higher than both the comparison group median, which fluctuated between roughly $70 million and $100 million, and the national median, which remained near zero. While the comparison group and national medians remained relatively flat, Marist's value diverged sharply upward starting in 2019, widening the gap between the university and its peers.

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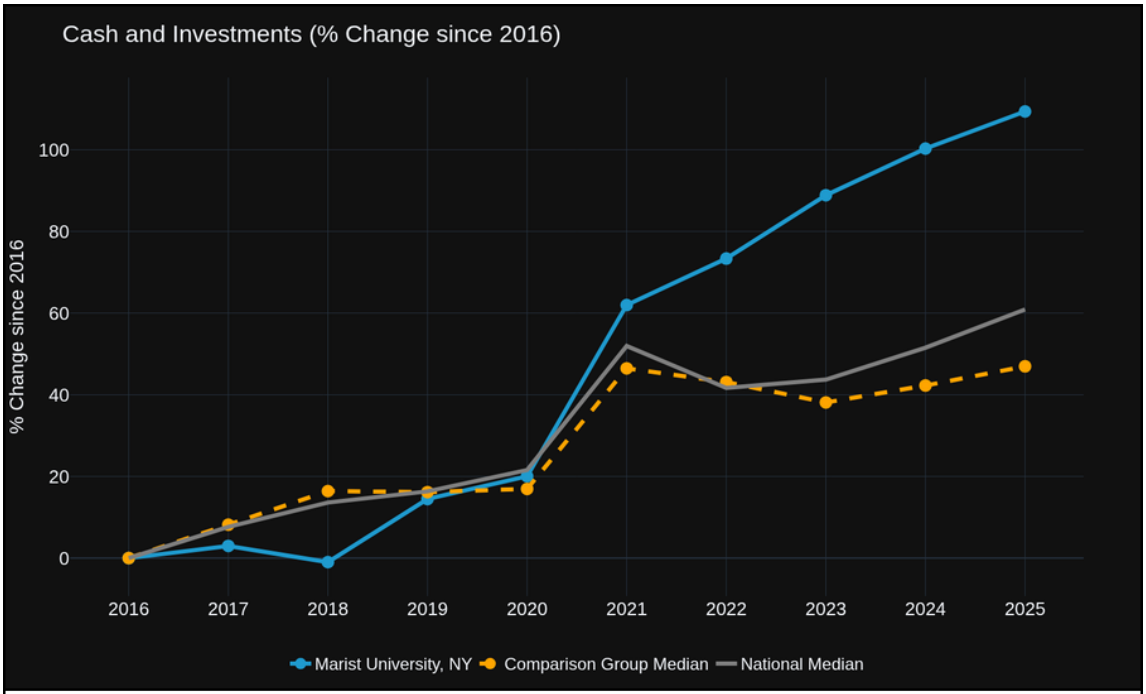
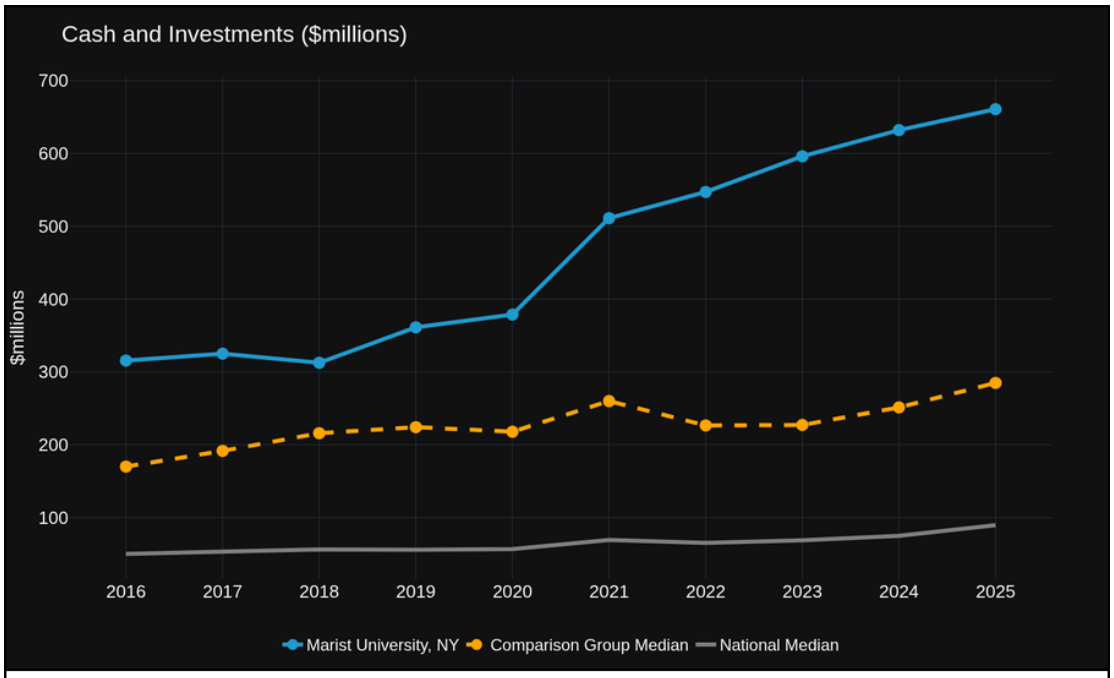


Marist University's cash and investments, measured as a percentage change since 2016, remained relatively aligned with the comparison group median and national median through 2020. However, beginning in 2021, Marist diverged significantly, exhibiting a much steeper upward trend than both medians. While the comparison group and national medians plateaued or grew slowly to finish between roughly 45% and 60% growth by 2025, Marist continued to rise steadily, surpassing a 100% increase relative to its 2016 baseline. This trajectory places Marist well above both the national and comparison group medians for the final four years of the chart.



The graph displays raw values for Cash and Investments in millions of dollars, illustrating that Marist University, NY consistently held significantly higher reserves than both the Comparison Group Median and the National Median from 2016 to 2025. Marist's total remained relatively stable around $320 million until 2020, after which it surged to over $500 million in 2021 and continued a steady climb to approximately $660 million by 2025. Meanwhile, the Comparison Group Median fluctuated between roughly $170 million and $280 million, and the National Median remained the lowest, staying below $100 million for the entire duration. This divergence resulted in a widening gap between Marist University and the median benchmarks, particularly accelerating after 2020.

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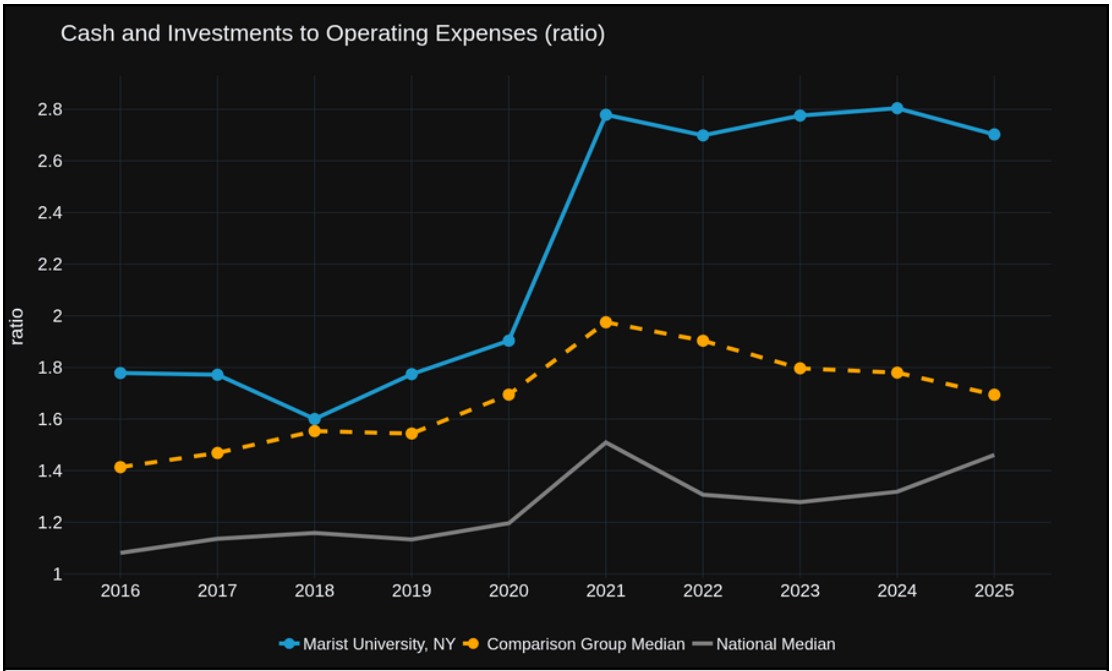
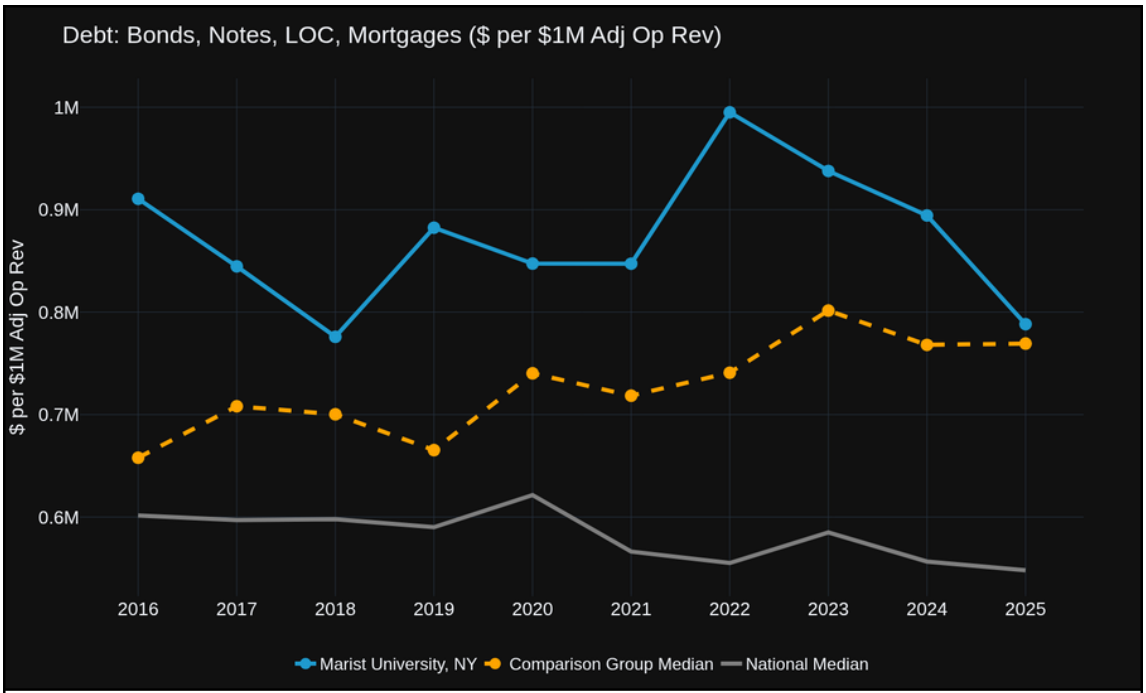


Marist University, NY consistently maintained a significantly higher Cash and Investments to Operating Expenses ratio than both the Comparison Group Median and the National Median throughout the period from 2016 to 2025. While all three metrics showed gradual growth until 2020, Marist University experienced a sharp spike in 2021, jumping from approximately 1.9 to nearly 2.8, whereas the Comparison Group Median only reached just under 2.0. Following this divergence, Marist's ratio remained elevated above 2.6 through 2025, while the Comparison Group Median and National Median both trended downward or stabilized at much lower levels around 1.7 and 1.4 respectively.



Marist University consistently exhibited the highest debt intensity, measured as dollars of debt per $1 million of adjusted operating revenue, remaining significantly above both the comparison group median and the national median for the entire duration shown. Marist's metric experienced a notable spike in 2022, reaching nearly $1 million per $1 million of revenue, before declining sharply through 2025. In contrast, the national median remained the lowest throughout the period and generally trended downward after 2020, while the comparison group median hovered in the middle with a gradual upward trend.

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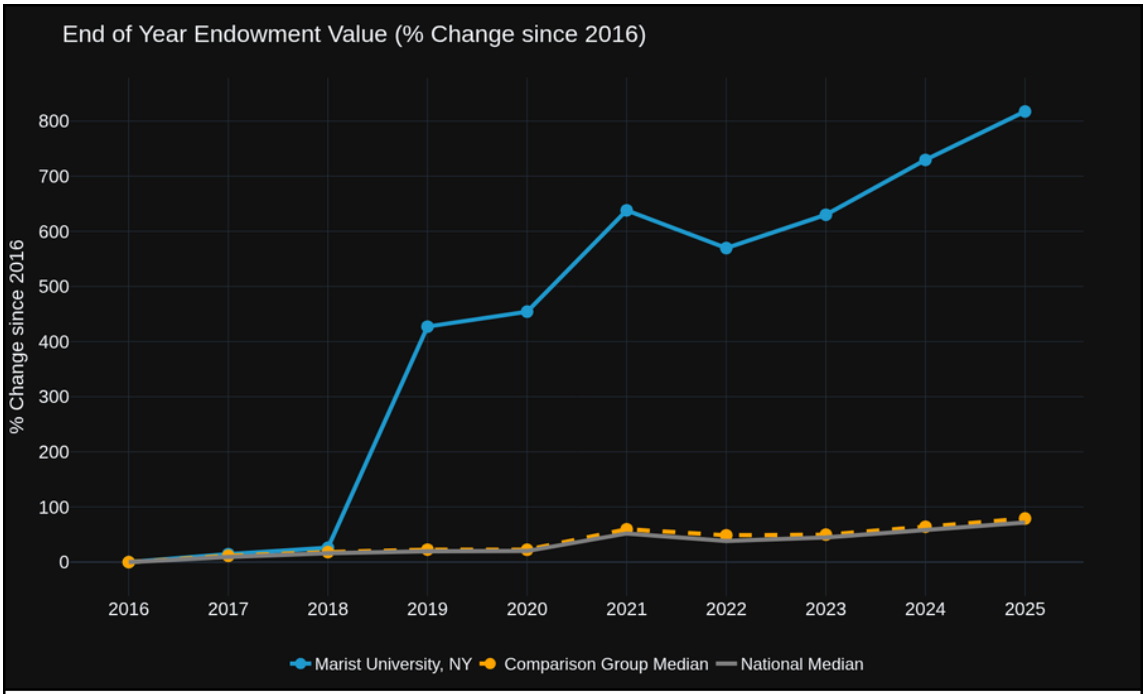
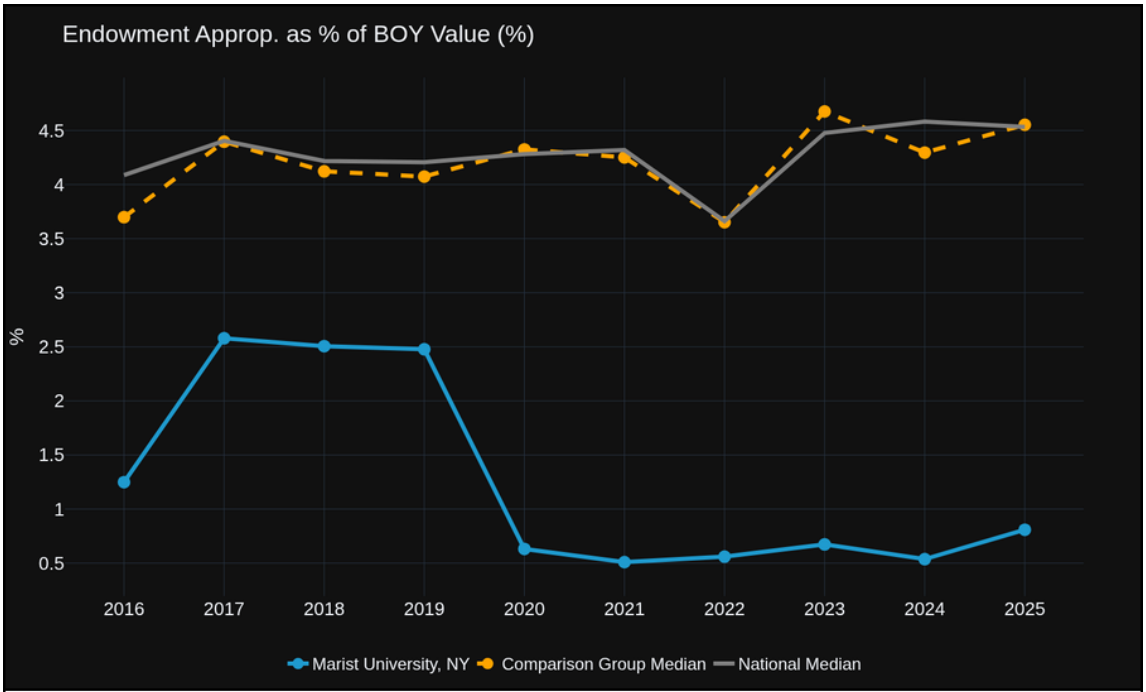


The chart illustrates the percentage change in End of Year Endowment Value since 2016, revealing a massive divergence between Marist University, NY and the other two metrics. While the Comparison Group Median and National Median remained relatively flat with growth consistently below 100%, Marist University experienced explosive growth starting in 2019. By 2025, Marist's endowment value had increased by over 800% relative to its 2016 baseline, vastly outperforming the benchmarks which showed only modest, gradual increases over the same period.



Marist University's endowment appropriation as a percentage of beginning-of-year value has consistently remained significantly lower than both the Comparison Group Median and the National Median from 2016 to 2025. While the comparison and national medians generally fluctuated between roughly 3.6% and 4.6%, Marist's metric peaked briefly around 2.6% in 2017 before dropping sharply in 2020 to below 1%. From 2020 onward, Marist maintained a low level below 1%, creating a substantial and sustained gap relative to the medians, which recovered to over 4% by 2023 after a shared dip in 2022.

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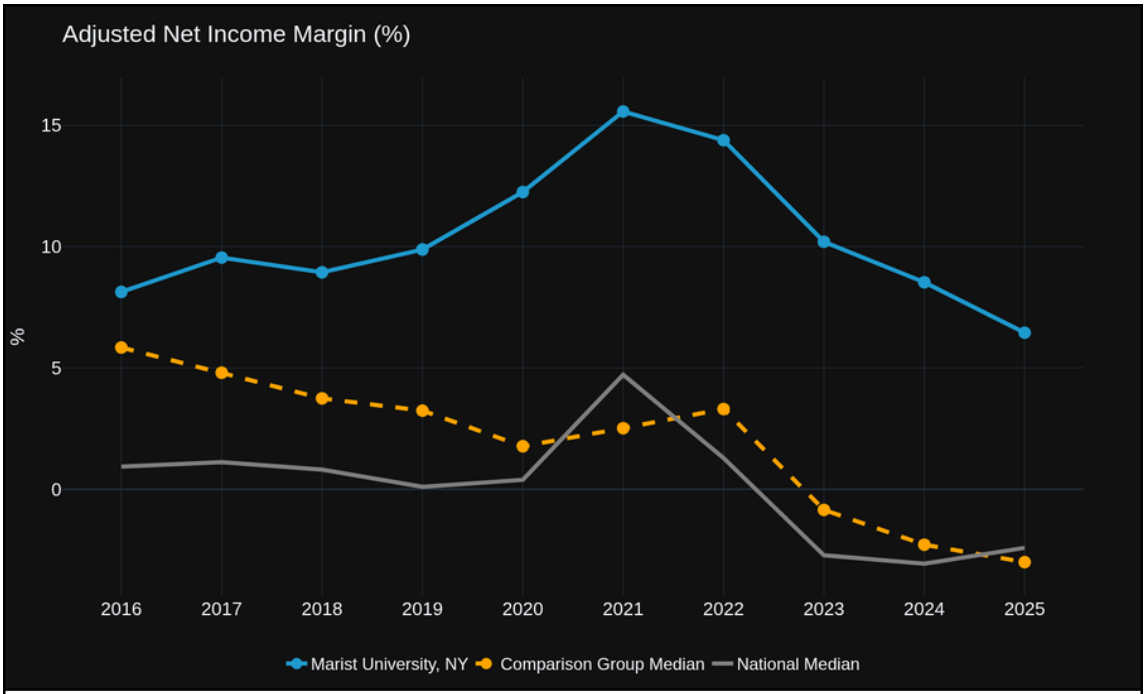
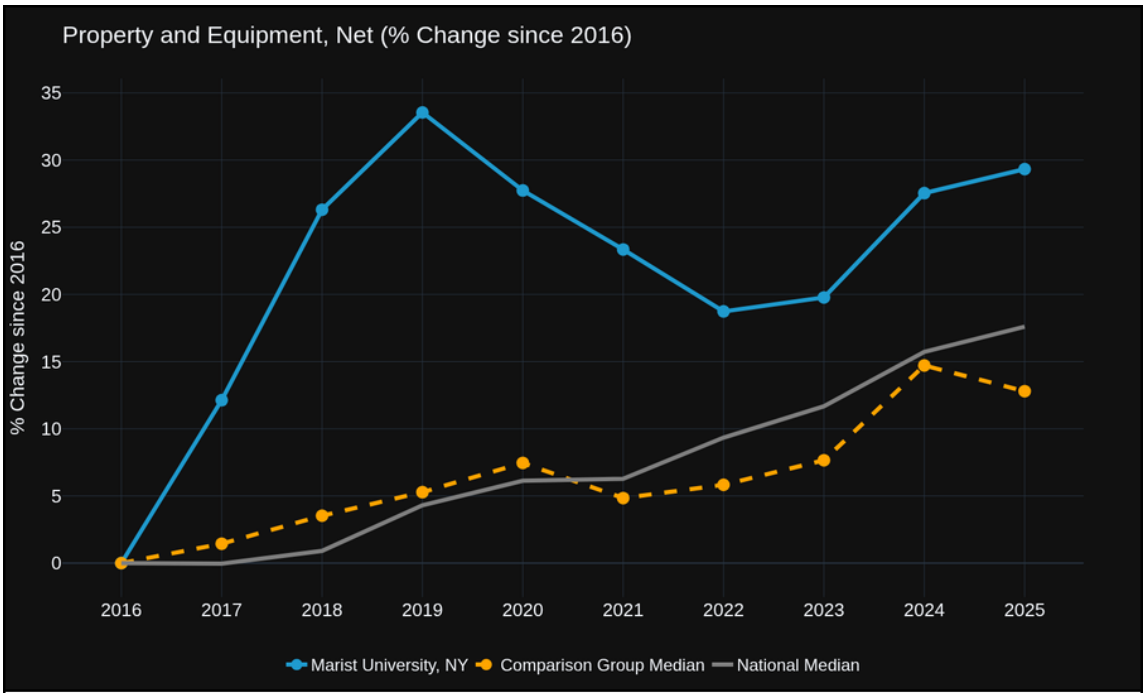


Marist University maintained a significantly higher Adjusted Net Income Margin than both the Comparison Group Median and the National Median throughout the entire observed period from 2016 to 2025. While Marist's margin peaked in 2021 at approximately 16% before declining, it remained positive and well above the other two groups, which both dropped below zero starting in 2023. By 2025, a distinct divergence is visible where Marist retains a positive margin around 6-7%, whereas both the comparison group and national medians have fallen into negative territory.



Marist University, NY consistently exhibits a significantly higher percentage change in net property and equipment relative to 2016 levels compared to both the comparison group median and the national median. While the university's growth spiked to over 30% in 2019 before dipping to roughly 19% in 2022, the benchmark groups showed a much more gradual and steady increase over the same period. By 2025, Marist University had rebounded to nearly a 30% increase, maintaining a substantial lead over the comparison group median and national median, which remained below the 20% mark.

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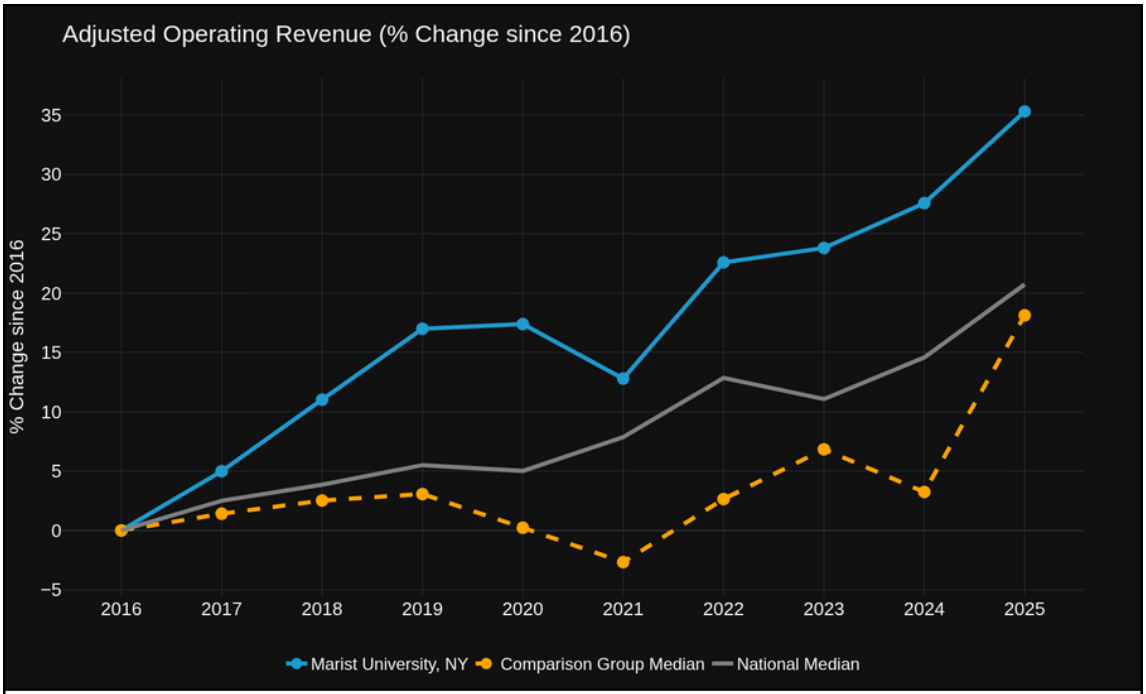
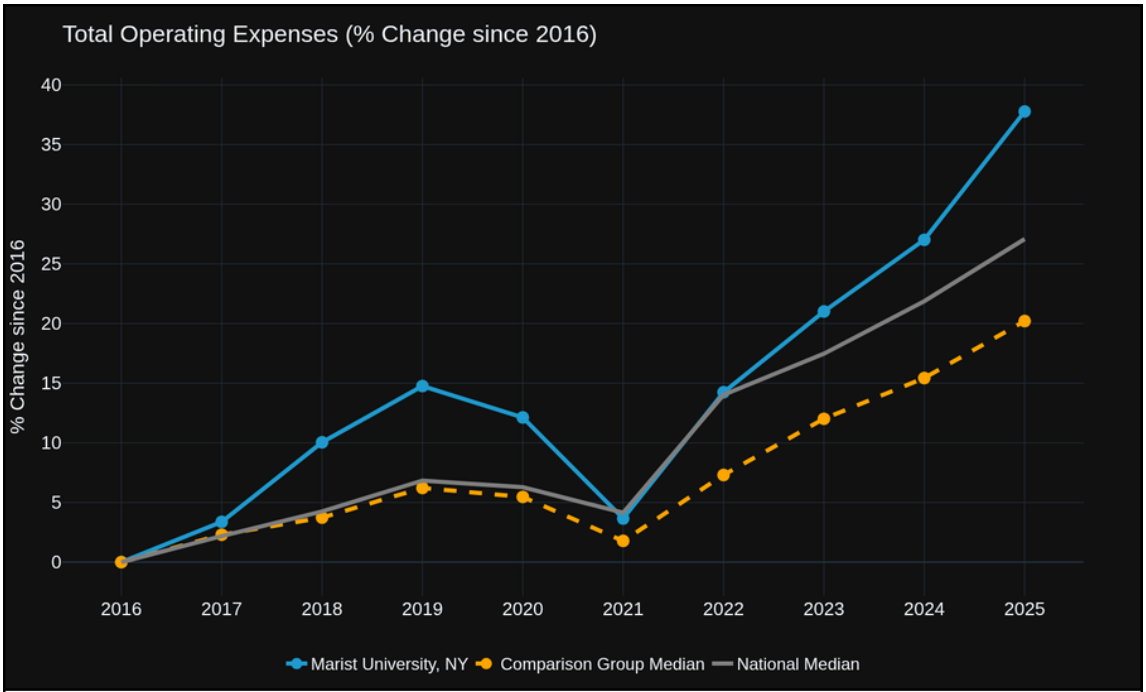


The chart displays the percentage change in adjusted operating revenue since 2016, revealing that Marist University, NY has consistently outperformed both the National Median and the Comparison Group Median throughout the observed period. While the Comparison Group Median briefly fell below zero in 2021, indicating a decrease relative to 2016 levels, Marist University maintained a steady upward trajectory with only a minor dip in the same year. By 2025, Marist University reached a peak of approximately 35% growth, significantly widening the gap with the National Median (around 21%) and the Comparison Group Median (around 18%).



Marist University's total operating expenses, expressed as a percentage change since 2016, consistently exceeded both the comparison group median and national median from 2016 through 2019. A notable decline in 2021 caused Marist's growth rate to converge with the other two lines before diverging sharply upward in subsequent years. By 2025, Marist University shows the highest percentage increase at nearly 40%, significantly outpacing the national median and the comparison group median, which ended at approximately 27% and 20% respectively.

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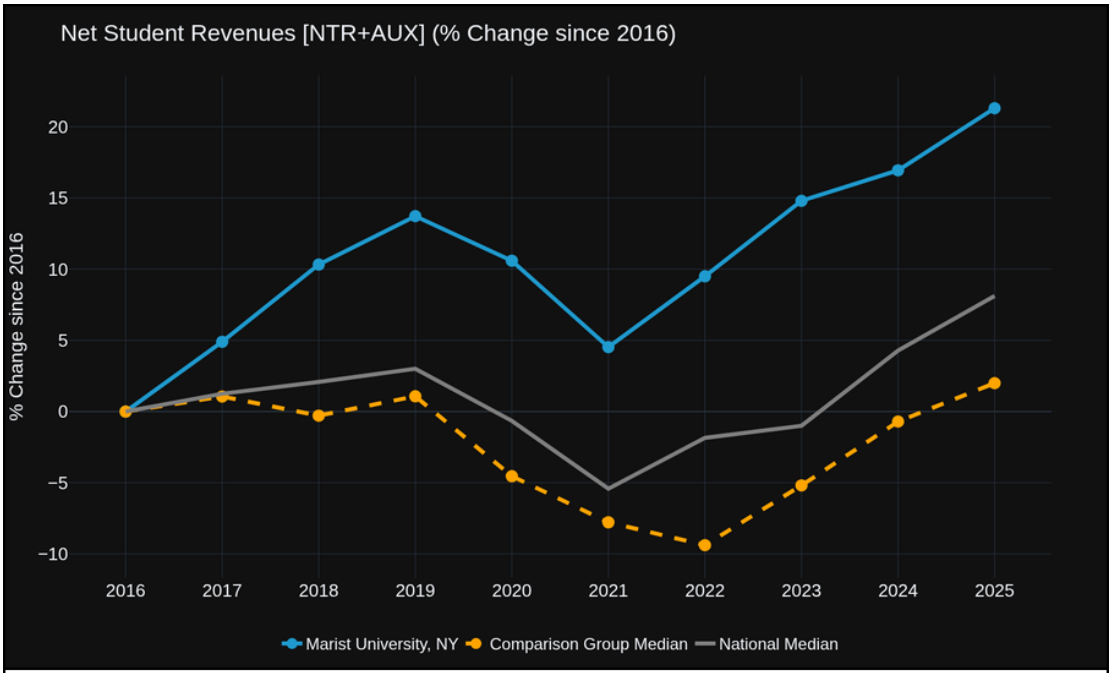
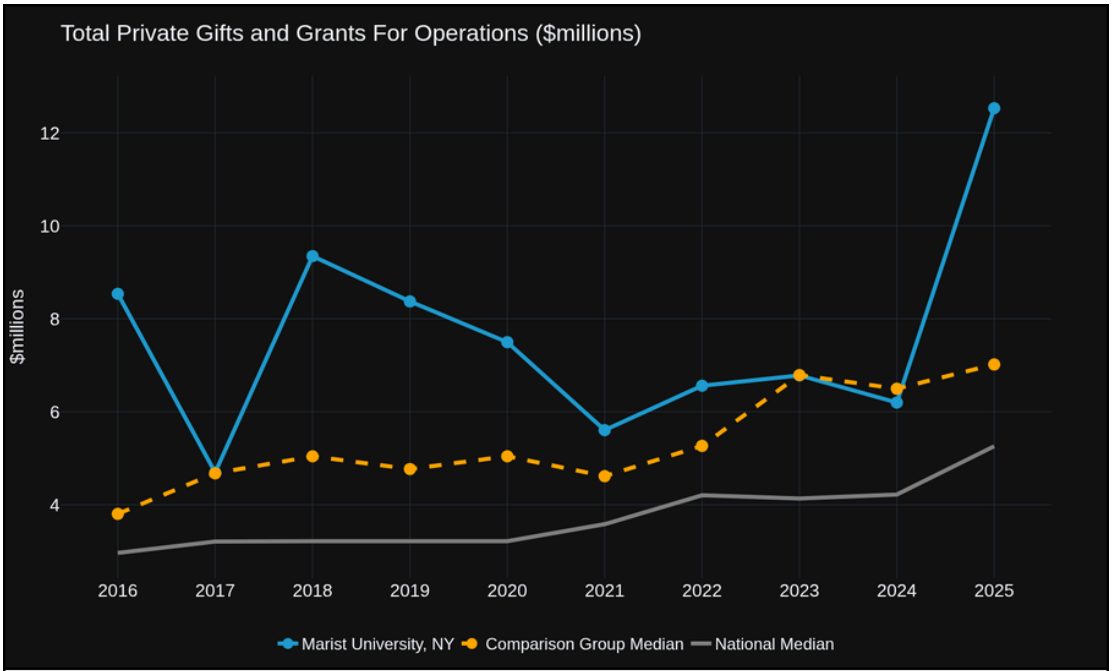


Marist University, NY demonstrates a consistently strong upward trend in Net Student Revenues relative to 2016 levels, significantly outperforming both the Comparison Group Median and the National Median throughout the observed period. While the Comparison Group Median and National Median both dipped below their 2016 levels between 2020 and 2022, Marist's percentage change remained positive, never dropping below zero. By 2025, Marist reached a peak increase of over 20%, creating a widening gap compared to the Comparison Group Median, which only recovered to a slight increase above 0%, and the National Median, which reached approximately 8%.



Marist University's total private gifts and grants for operations, measured in raw millions of dollars, generally remained above both the comparison group median and the national median throughout the period, though with significantly more volatility than the steady upward trends seen in the medians. While the comparison group and national medians grew gradually, Marist University's figures fluctuated sharply, converging with the comparison group median in 2017 and 2023 before briefly dipping below it in 2024. The graph concludes with a dramatic outlier in 2025, where Marist University surged to over $12 million, far exceeding the comparison group median which reached approximately $7 million.

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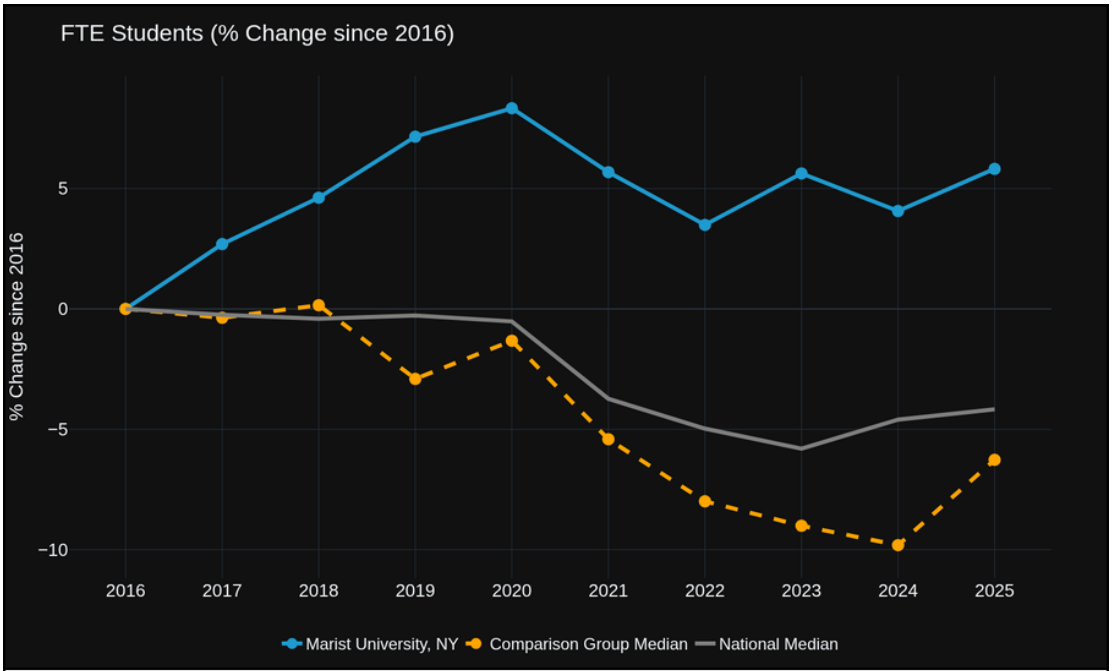
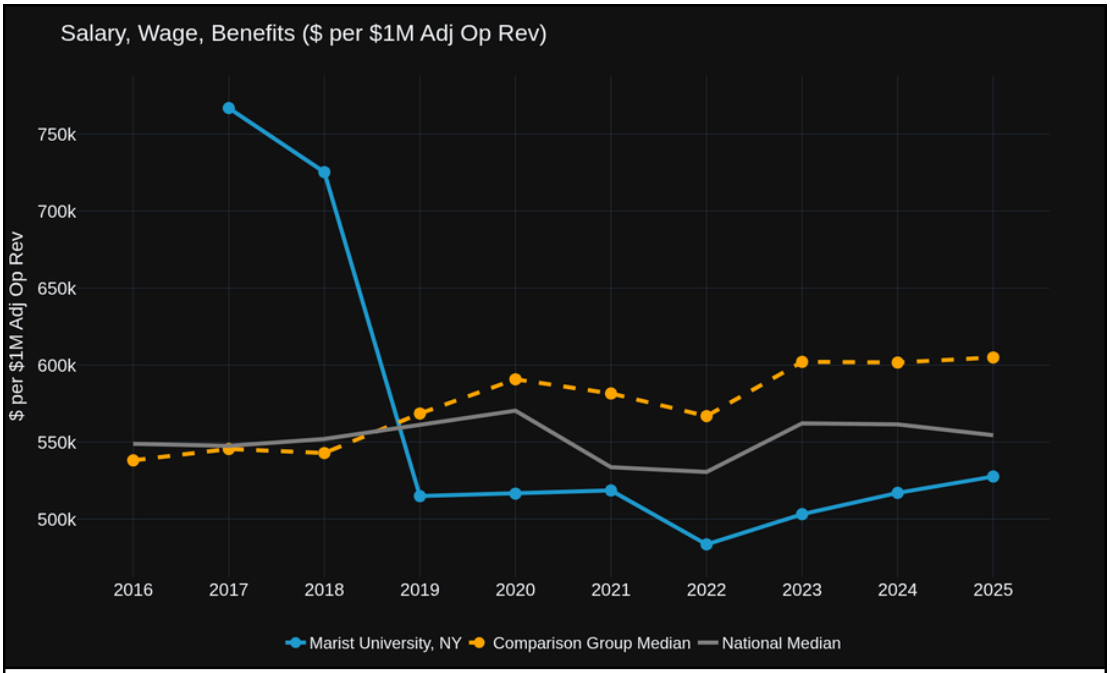


Marist University demonstrates a consistent increase in FTE students relative to 2016 levels, maintaining a positive percentage change that peaks above 5% in 2020 and remains above 5% in 2025. In contrast, both the Comparison Group Median and the National Median exhibit a downward trend, dropping below their 2016 baselines to show negative percentage changes for most of the period from 2020 onwards. The Comparison Group Median experiences the steepest decline, reaching a low of approximately -10% in 2024, whereas the National Median declines more moderately to around -6%. This divergence highlights that Marist has expanded its student body while both the comparison group and the national median have contracted relative to their 2016 levels.



Marist University exhibited a significant outlier in 2017 with salary, wage, and benefits costs exceeding $750k per $1M of adjusted operating revenue, which was substantially higher than both the comparison group and national medians. Following a sharp decline between 2017 and 2019, the university's metric plummeted to approximately $515k, crossing below and remaining consistently lower than both the comparison group median and national median for the rest of the timeline. While the comparison group median gradually increased to over $600k by 2025, Marist University remained relatively flat and lower, fluctuating between roughly $485k and $530k during the same period.

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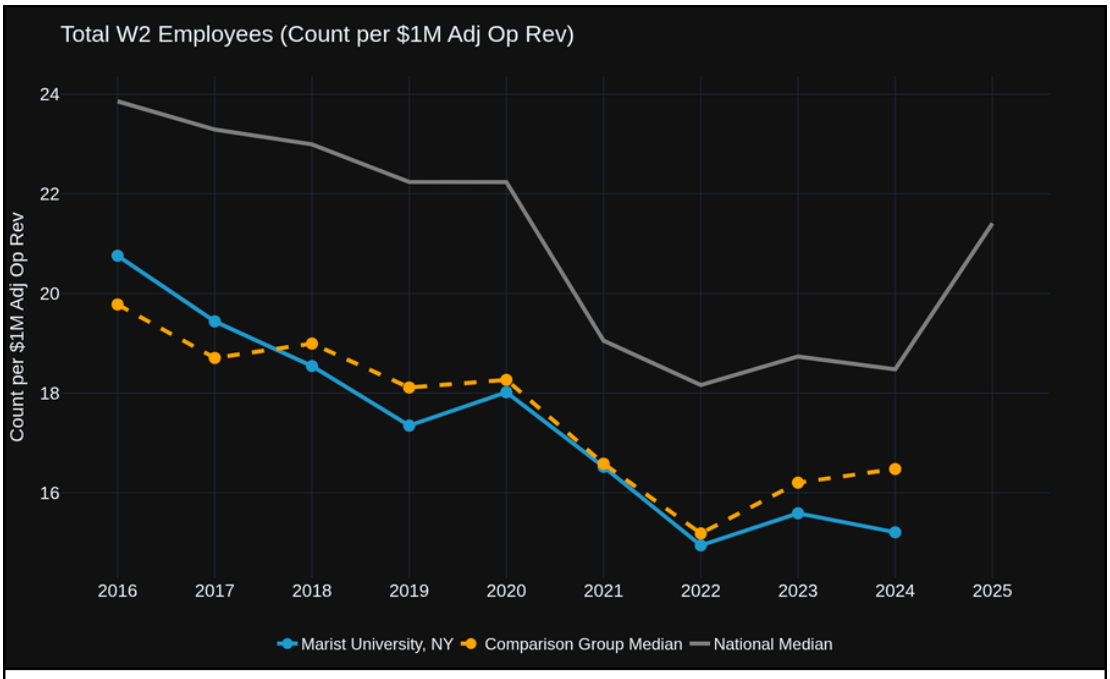
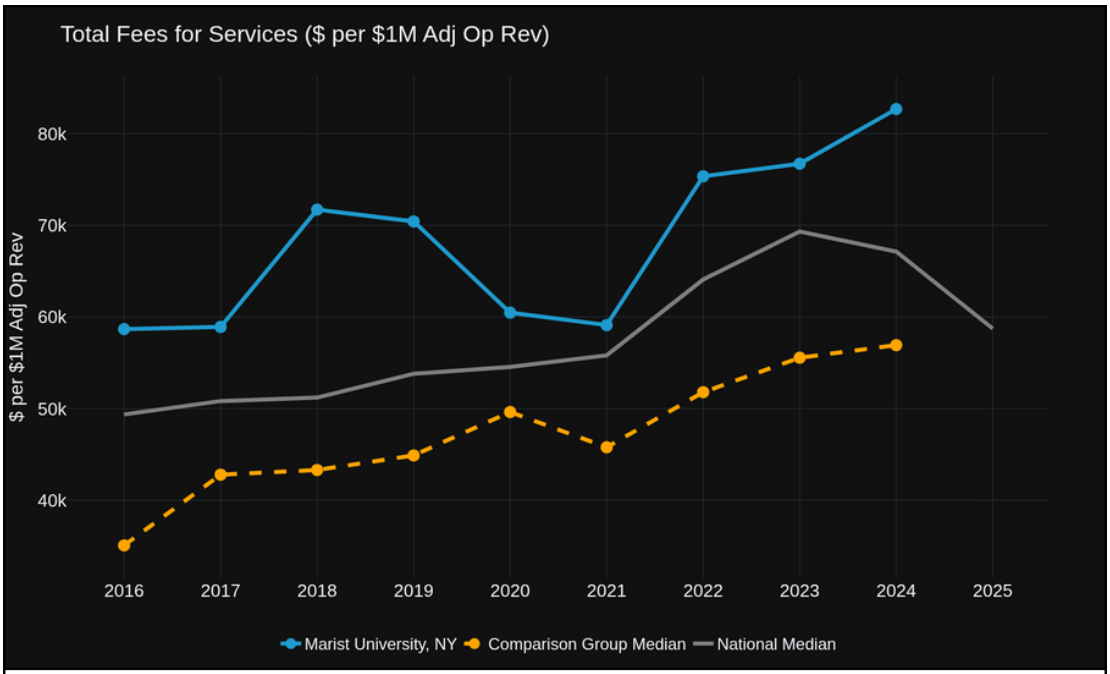


The graph tracks the count of W2 employees per $1 million of adjusted operating revenue, showing that Marist University consistently had a lower employee intensity than both the comparison group median and the national median across all years displayed. From 2016 to 2022, Marist's metric declined steadily, closely following the downward trend of the comparison group, while the national median remained significantly higher throughout the period. After reaching a low in 2022, Marist's ratio fluctuated slightly between 15 and 16, whereas the national median experienced a sharp increase in 2025, further widening the gap between the university and the national average.



Marist University consistently demonstrates a higher intensity of Total Fees for Services per $1 million of adjusted operating revenue compared to both the Comparison Group Median and the National Median from 2016 through 2025. While the Comparison Group and National Medians show a relatively gradual upward trajectory (with the National Median peaking in 2023 before declining), Marist's metric is characterized by significant volatility, including a sharp spike in 2018 and a steep climb from 2021 to a peak in 2024. Throughout the timeline, a substantial gap remains between Marist and the other two groups, with Marist reaching over $80k in 2024 while the Comparison Group Median stays below $60k.

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