

FOR INSTITUTIONAL INVESTORS ONLY
NOT TO BE DISTRIBUTED TO RETAIL CLIENTS

This strategy is offered by Insight North America LLC (INA) in the United States
INA is part of Insight Investment. Performance presented is that of Insight Investment
and should not specifically be viewed as the performance of INA
Please refer to the important disclosures at the back of this document



INVESTMENT SOLUTIONS FOR INSURERS

INSURANCE INVESTMENT EXPERTISE TO COMPLEMENT YOURS

- 1 A custom approach to managing your assets
- 2 Dedicated insurance specialists drawing from deep investment resources
- 3 Customized insurance portfolios tailored to your outcomes
- 4 An extension of your team

A CUSTOM APPROACH TO MANAGING YOUR ASSETS

Insight's mission is to offer a custom approach that prioritizes the certainty of meeting clients' chosen objectives.

FOCUS ON CLIENT OUTCOMES

- Our insurance investment specialists work closely with you to understand and define your needs and goals
- We manage portfolios focused on achieving a clear, defined outcome for you

A SPECIALIST IN RISK MANAGEMENT AND FIXED INCOME SOLUTIONS

- Insight is a specialist in risk management and fixed income solutions, tailoring insurance portfolios to reflect customized goals
- We build resilience into portfolios, seeking to withstand market events and maintain flexibility to adapt as requirements evolve over time

KNOWLEDGE AND EXPERTISE FOR INSURERS

- Our specialized teams focus on delivering investment and service quality to insurers, provided via direct access to portfolio managers, solutions designers and actuaries
- Insight has decades of experience serving US and international insurers. Our parent company, The Bank of New York Mellon Corporation (BNY Mellon), also offers a range of specialist insurance services

DEDICATED INSURANCE SPECIALISTS DEEP INVESTMENT SOLUTIONS RESOURCES¹



US FIXED INCOME TEAM

- 82 investment professionals
 - 31 portfolio managers
 - 18 credit analysts
 - 22 years' industry experience
 - 14 years at Insight

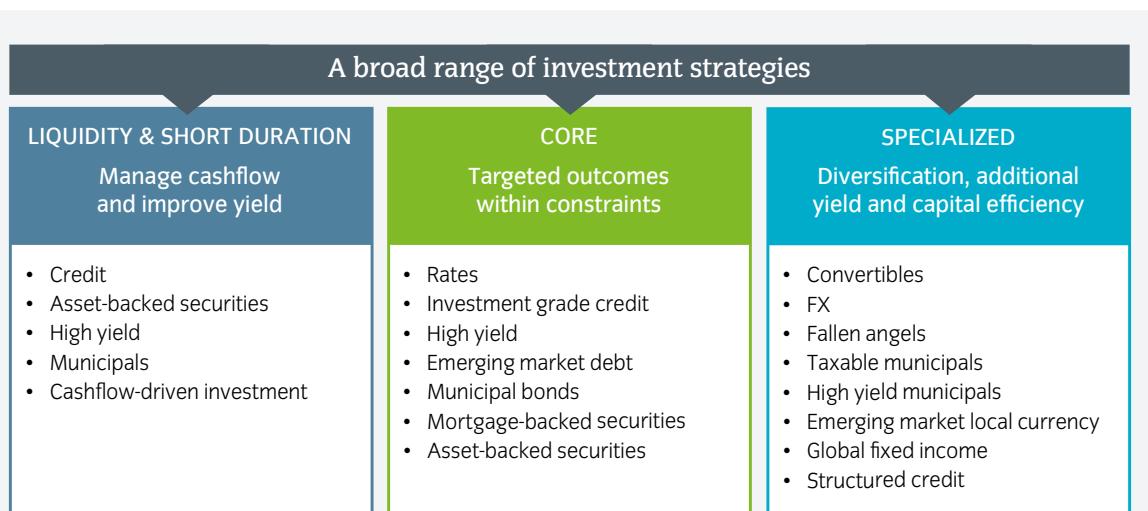
GLOBAL FIXED INCOME

- 170 investment professionals
 - 66 portfolio managers
 - 46 credit analysts
 - 19 years' industry experience
 - 12 years at Insight

¹ As of March 31, 2025. Years of tenure and experience presented are average measures across the relevant team. Where relevant, years presented at Insight include predecessor firms. Includes employees of Insight North America LLC (INA) and its affiliates, which provide asset management services as part of Insight, the corporate brand for certain companies operated by Insight Investment Management Limited (IIML). ²Portfolio Managers.

CUSTOMIZED INSURANCE PORTFOLIOS TAILORED TO YOUR REQUIRED OUTCOMES

We draw from a broad range of investment strategies to build a customized investment program for you. This portfolio will target your required investment outcome, and will be optimized to reflect your specific business needs and objectives.

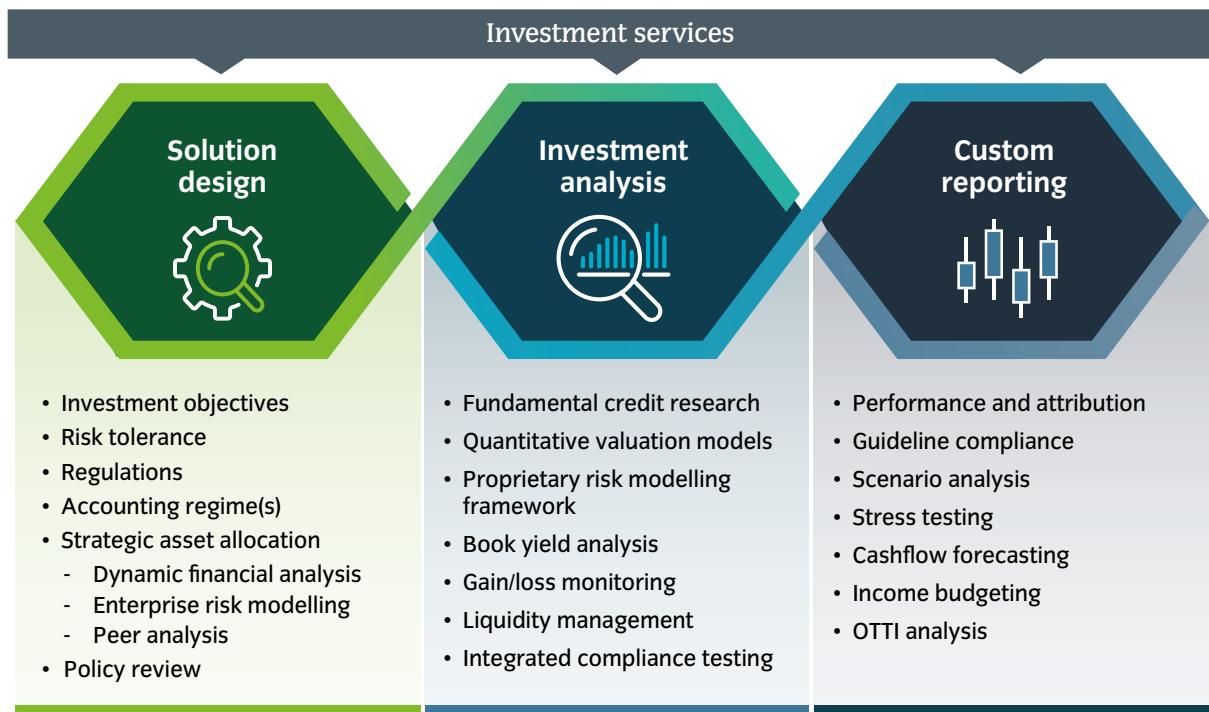


Insight makes no assurances that performance targets will be achieved. Return targets do not reflect advisory fees and other expenses. Please refer to the targeted returns disclosures at the back of this document. Diversification cannot ensure a profit or protect against loss in declining markets. All investments involve some level of risk, including loss of principal.

AN EXTENSION OF YOUR TEAM

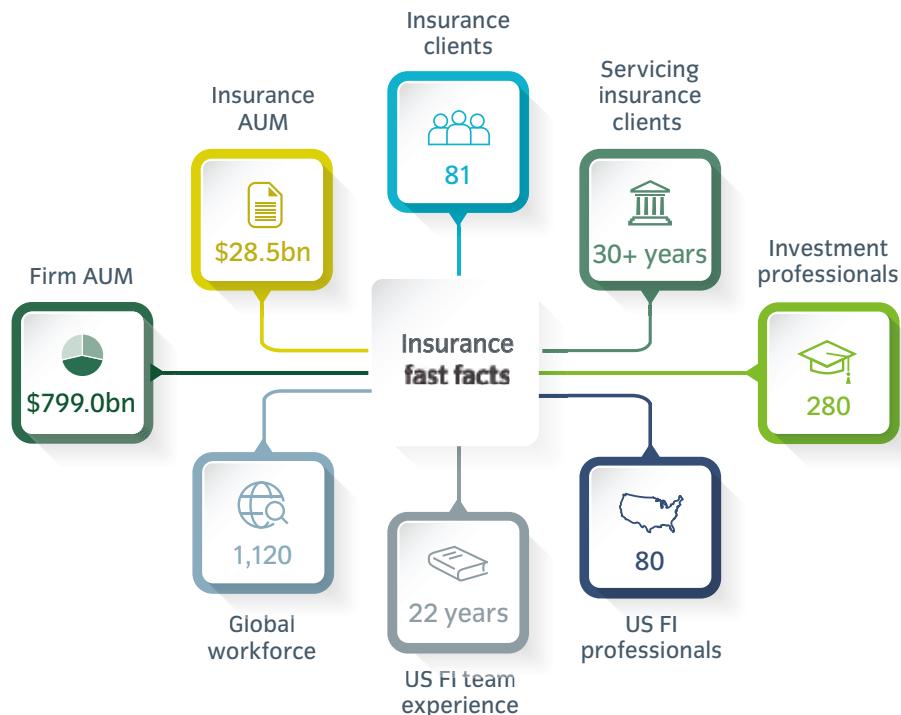
We strive to be an extension of your team characterized by:

Partnership	Close, collaborative relationship with two-way dialogue and challenge.
Tailored programs	Tailored investment program that adapts to your changing needs.
Customized reporting	Flexible reporting suite that provides the information you need when you need it.
Advice and training	Education for Boards/Committees and support for NAIC ratings and AM Best reviews.
Expertise	Open access to deep investment resources including portfolio managers, research analysts, actuaries and solution designers.



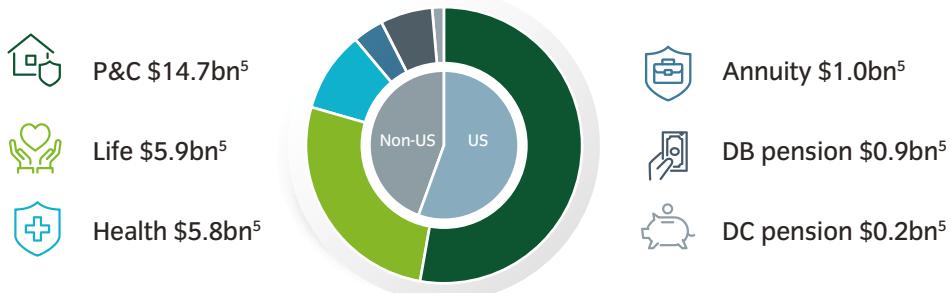
ABOUT US

INSURANCE FAST FACTS³



Extensive experience serving US insurers

\$28.5bn / 81 insurance clients⁴



³ As of March 31, 2025. Assets under management (AUM) are represented by the value of the client's assets or liabilities Insight is asked to manage. These will primarily be the mark-to-market value of securities managed on behalf of clients, including collateral if applicable. Where a client mandate requires Insight to manage some or all of a client's liabilities (e.g. LDI strategies), AUM will be equal to the value of the client specific liability benchmark and/or the notional value of other risk exposure through the use of derivatives. Insight North America (INA) is part of 'Insight' or 'Insight Investment', the corporate brand for certain asset management companies operated by Insight Investment Management Limited including, among others, Insight Investment Management (Global) Limited, Insight Investment International Limited and Insight Investment Management (Europe) Limited. Advisory services referenced herein are available in the US only through INA. Legal entity Insight North America LLC's AUM is \$137.9bn as of March 31, 2025. Figures shown in USD. FX rates as per WM Reuters 4pm spot rates. Includes employees of Insight North America LLC (INA) and its affiliates, which provide asset management services as part of Insight, the corporate brand for certain companies operated by Insight Investment Management Limited (IIML). ⁴ Total clients: 81 representing 45 US and 36 non-US insurance clients. ⁵ Total entities: 83.

FIND OUT MORE

Insight Investment
200 Park Avenue
New York, NY 10166



inquiries@insightinvestment.com



www.insightinvestment.com



[company/insight-investment-north-america](https://www.linkedin.com/company/insight-investment-north-america)

IMPORTANT DISCLOSURES

This document has been prepared by Insight North America LLC (INA), a registered investment adviser under the Investment Advisers Act of 1940 and regulated by the US Securities and Exchange Commission. INA is part of 'Insight' or 'Insight Investment', the corporate brand for certain asset management companies operated by Insight Investment Management Limited including, among others, Insight Investment Management (Global) Limited, Insight Investment International Limited and Insight Investment Management (Europe) Limited (IIMEL).

Opinions expressed herein are current opinions of Insight, and are subject to change without notice. Insight assumes no responsibility to update such information or to notify a client of any changes. Any outlooks, forecasts or portfolio weightings presented herein are as of the date appearing on this material only and are also subject to change without notice. Insight disclaims any responsibility to update such views. No forecasts can be guaranteed.

Nothing in this document is intended to constitute an offer or solicitation to sell or a solicitation of an offer to buy any product or service (nor shall any product or service be offered or sold to any person) in any jurisdiction in which either (a) INA is not licensed to conduct business, and/or (b) an offer, solicitation, purchase or sale would be unavailable or unlawful.

This document should not be duplicated, amended, or forwarded to a third party without consent from INA. This is a marketing document intended for institutional investors only and should not be made available to or relied upon by retail investors. This material is provided for general information only and should not be construed as investment advice or a recommendation. You should consult with your adviser to determine whether any particular investment strategy is appropriate.

Assets under management (AUM) represented by the value of the client's assets and liabilities Insight is asked to manage. These will primarily be the mark-to-market value of securities managed on behalf of clients, including collateral if applicable. Where a client mandate requires Insight to manage some or all of a client's liabilities (e.g. LDI strategies), AUM will be equal to the value of the client specific liability benchmark and/or the notional value of other risk exposure through the use of derivatives. Regulatory assets under management without exposures can be provided upon request. Unless otherwise specified, the performance shown herein is that of Insight Investment (for Global Investment Performance Standards (GIPS®), the 'firm') and not specifically of Insight North America. A copy of the GIPS composite disclosure page is available upon request.

Past performance is not a guide to future performance, which will vary. The value of investments and any income from them will fluctuate and is not guaranteed (this may partly be due to exchange rate changes). Future returns are not guaranteed and a loss of principal may occur.

Targeted returns intend to demonstrate that the strategy is managed in such a manner as to seek to achieve the target return over a normal market cycle based on what Insight has observed in the market, generally, over the course of an investment cycle. In no circumstances should the targeted returns be regarded as a representation, warranty or prediction that the specific deal will reflect any particular performance or that it will achieve or is likely to achieve any particular result or that investors will be able to avoid losses, including total losses of their investment.

The information shown is derived from a representative account deemed to appropriately represent the management styles herein. Each investor's portfolio is individually managed and may vary from the information shown. The mention of a specific security is not a recommendation to buy or sell such security. The specific securities identified are not representative of all the securities purchased, sold or recommended for advisory clients. It should not be assumed that an investment in the securities identified will be profitable. Actual holdings will vary for each client and there is no guarantee that a particular client's account will hold any or all of the securities listed.

The quoted benchmarks within this document do not reflect deductions for fees, expenses or taxes. These benchmarks are unmanaged and cannot be purchased directly by investors. Benchmark performance is shown for illustrative purposes only and does not predict or depict the performance of any investment. There may be material factors relevant to any such comparison such as differences in volatility, and regulatory and legal restrictions between the indices shown and the strategy.

Transactions in foreign securities may be executed and settled in local markets. Performance comparisons will be affected by changes in interest rates. Investment returns fluctuate due to changes in market conditions. Investment involves risk, including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved.

Insight does not provide tax or legal advice to its clients and all investors are strongly urged to consult their tax and legal advisors regarding any potential strategy or investment.

Information herein may contain, include or is based upon forward-looking statements within the meaning of the federal securities laws, specifically Section 21E of the Securities Exchange Act of 1934, as amended. Forward-looking statements include all statements, other than statements of historical fact, that address future activities, events or developments, including without limitation, business or investment strategy or measures to implement strategy, competitive strengths, goals expansion and growth of our business, plans, prospects and references to future or success. You can identify these statements by the fact that they do not relate strictly to historical or current facts. Words such as 'anticipate,' 'estimate,' 'expect,' 'project,' 'intend,' 'plan,' 'believe,' and other similar words are intended to identify these forward-looking statements. Forward-looking statements can be affected by inaccurate assumptions or by known or unknown risks and uncertainties. Many such factors will be important in determining our actual future results or outcomes. Consequently, no forward-looking statement can be guaranteed. Our actual results or outcomes may vary materially. Given these uncertainties, you should not place undue reliance on these forward-looking statements.

Insight and BNY Mellon Securities Corporation (BNYMSC) are subsidiaries of BNY Mellon. BNYMSC is a registered broker and FINRA member. BNY Mellon is the corporate brand of the Bank of New York Mellon Corporation and may also be used as a generic term to reference the Corporation as a whole or its various subsidiaries generally. Products and services may be provided under various brand names and in various countries by subsidiaries, affiliates and joint ventures of the Bank of New York Mellon Corporation where authorized and regulated as required within each jurisdiction. Unless you are notified to the contrary, the products and services mentioned are not insured by the FDIC (or by any government entity) and are not guaranteed by or obligations of the Bank of New York Mellon Corporation or any of its affiliates. The Bank of New York Mellon Corporation assumes no responsibility for the accuracy or completeness of the above data and disclaims all expressed or implied warranties in connection therewith. Personnel of certain of our BNY Mellon affiliates may act as: (i) registered representatives of BNYMSC (in its capacity as a registered broker-dealer) to offer securities, (ii) officers of the Bank of New York Mellon (a New York chartered bank) to offer bank-maintained collective investment funds and (iii) associated persons of BNYMSC (in its capacity as a registered investment adviser) to offer separately managed accounts managed by BNY Mellon Investment Management firms.

Disclaimer for Non-US Clients: Prospective clients should inform themselves as to the legal requirements and tax consequences within the countries of their citizenship, residence, domicile and place of business with respect to the purchase and ongoing provision of advisory services. No regulator or government authority has reviewed this document or the merits of the products and services referenced herein.

This document is directed and intended for 'institutional investors' (as such term is defined in various jurisdictions). By accepting this document, you agree (a) to keep all information contained herein (the 'Information') confidential, (b) not use the Information for any purpose other than to evaluate a potential investment in any product described herein, and (c) not to distribute the Information to any person other than persons within your organization or to your client that has engaged you to evaluate an investment in such product.

Telephone conversations may be recorded in accordance with applicable laws.

© 2025 Insight Investment. All rights reserved.3

16368-01-25