

FOR INSTITUTIONAL INVESTORS ONLY  
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# 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

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- 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

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- 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

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- 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
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# DEDICATED INSURANCE SPECIALISTS DEEP INVESTMENT SOLUTIONS RESOURCES<sup>1</sup>



## US FIXED INCOME TEAM

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

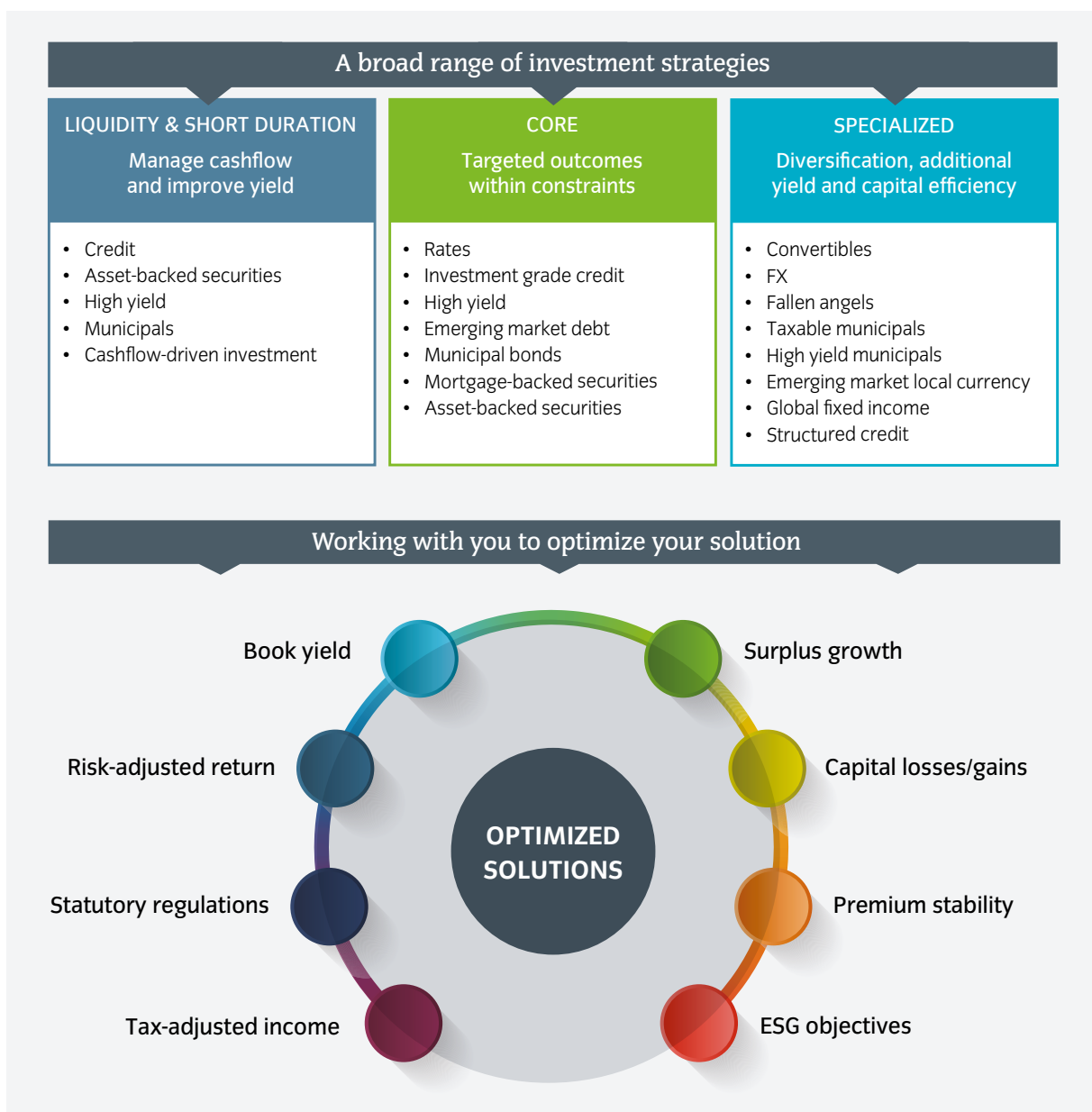
## GLOBAL FIXED INCOME

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

<sup>1</sup> 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). <sup>2</sup> Portfolio 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

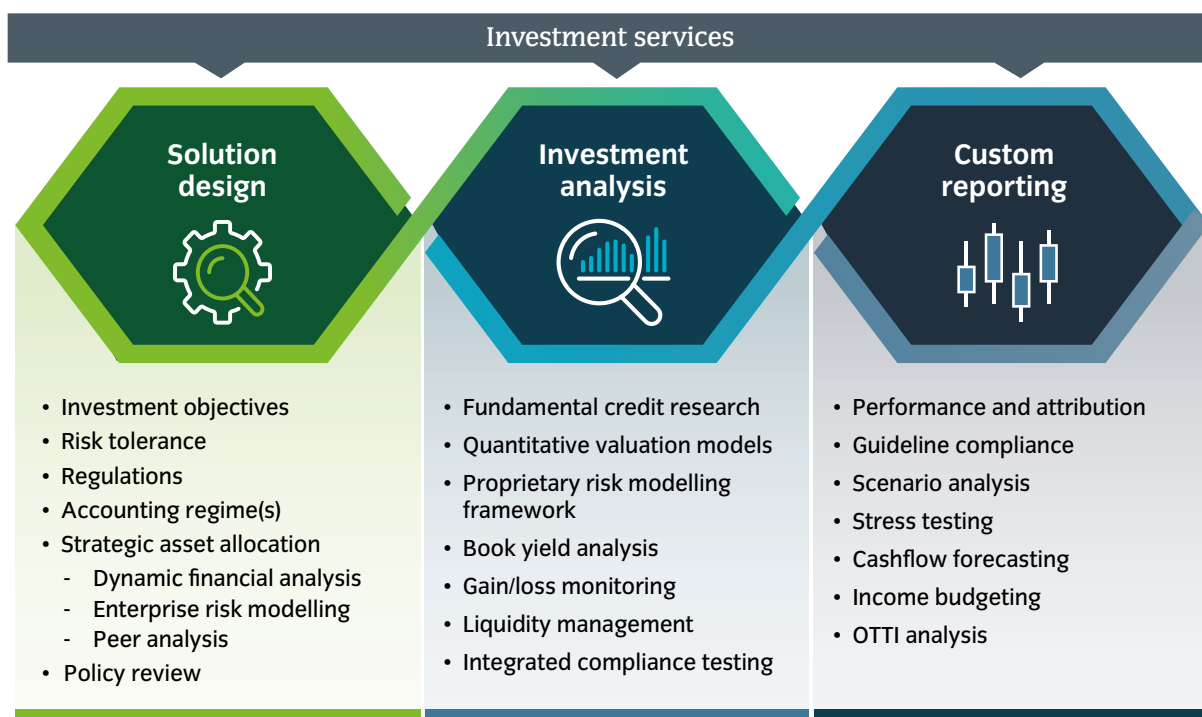
**Flexible reporting suite** that provides the information you need when you need it.

## Advice and training

**Education for Boards/Committees and support** for NAIC ratings and AM Best reviews.

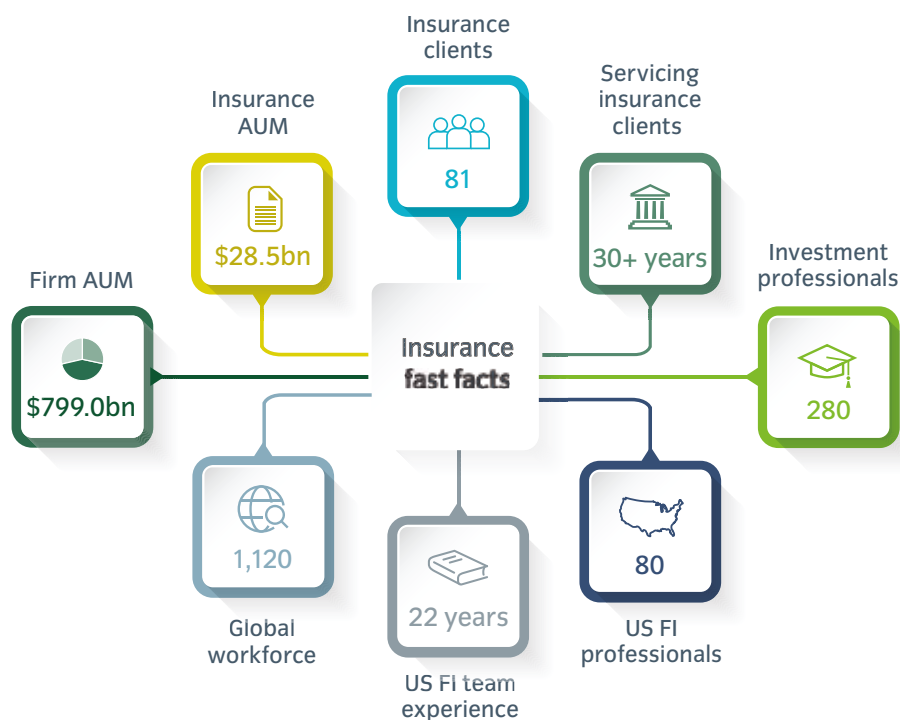
## Expertise

**Open access to deep investment resources** including portfolio managers, research analysts, actuaries and solution designers.



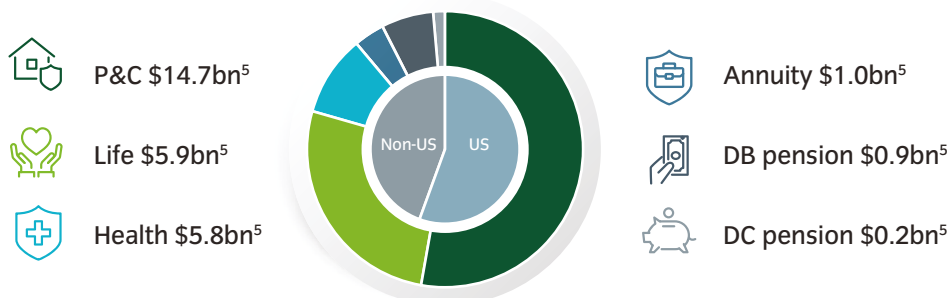
# ABOUT US

## INSURANCE FAST FACTS<sup>3</sup>



Extensive experience serving US insurers

\$28.5bn / 81 insurance clients<sup>4</sup>



<sup>3</sup> 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). <sup>4</sup> Total clients: 81 representing 45 US and 36 non-US insurance clients. <sup>5</sup> Total entities: 83.



FIND OUT MORE

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**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.

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