

# COLLABORATION



## Insurance partnerships

Working together to solve your investment challenges and meet liabilities



FOR PROFESSIONAL CLIENTS ONLY

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# Challenges and solutions

A complex insurance environment with a unique set of challenges requires deep knowledge and investment proficiency



## Challenge: Staying ahead of regulatory change

### Solution:

Choose a partner who can help you to stay ahead of global and local regulation, such as Solvency II, by providing technical, advisory and reporting expertise for the constantly changing insurance environment. Receive improved, transparent monitoring for the risk, performance and costs of each mandate in line with appetite and objectives.

## Challenge: Strengthening governance

### Solution:

Outsource full or partial accountability of the investment outcomes, providing the flexibility to adjust to your changing performance indicators. Increase the dedicated investment resources at your disposal and remove key-man risk and team pressures. Benefit from robust processes and receive best in class education against a changing insurance backdrop.



## Challenge: Meeting investment objectives

### Solution:

Transform your existing method by employing a dynamic investment process which utilises a broad scope of investments and uniquely specialist investment managers. Use a multi-asset approach beyond the traditional fixed income model, to tailor risk and return to meet shifting liabilities and investment goals.



# Insurance solutions

A range of partnership solutions dedicated to meeting your needs



## Outsourced chief investment officer (OCIO)

### Your objectives, our delivery: a bespoke approach

Our OCIO solution can provide a unique and wide range of strategic partnerships through one relationship. Insurers can gain access to the necessary investment expertise to meet their investment goals, manage their appetite for risk and volatility as well as meeting their implementation requirements around Solvency II and regulatory reporting.

## Funds and strategies

### Diversified to efficiently navigate markets

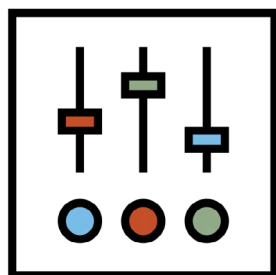
A multi-asset approach that combines best-of-breed specialist investment managers with our custom smart beta strategies, factor exposures, asset allocation expertise and world-class implementation capabilities. Minimise risks and exploit market opportunities in a timely and dynamic way through our open architecture approach. Access alternatives to the traditional benchmark approach including unconstrained bond strategies and real assets.



## Implementation

### Manage your underlying costs down

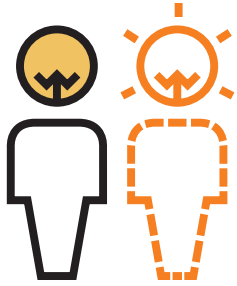
Effectively access all of the trading and implementation tools required to preserve realised returns and drive costs down with only one contract. Access dedicated asset-class experts and a 24-hour global trading desk. Receive management at the total portfolio level, integrated across multiple services with clear, transparent reporting. Our unsurpassed access to liquidity and pure agency model means no hidden fees or undisclosed revenue sources.



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# Working with you

Insurance asset management expertise



## Partnership

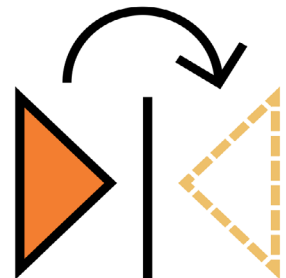
Across the spectrum | Expert knowledge | Objective-driven

- Adept across the delegation spectrum – from macro strategy advice to full delegation, with relevant and increasing accountability
- Strategic partnership with a Lloyds of London insurer
- Dedicated team of insurance specialists

## Transparency

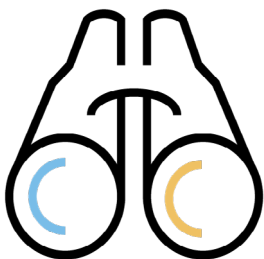
Solvency II reporting | ESG insight | Full look-through capabilities

- Industry-leading full-look through reporting service for Solvency II
- Innovative reporting on current and breakthrough trends/issues such as ESG
- Accurate and reliable reporting ensuring compliance obligations are met and no capital charge penalties are incurred
- Cost transparency



## Accountability

Removing key-person risk | Improved governance | Investment clarity

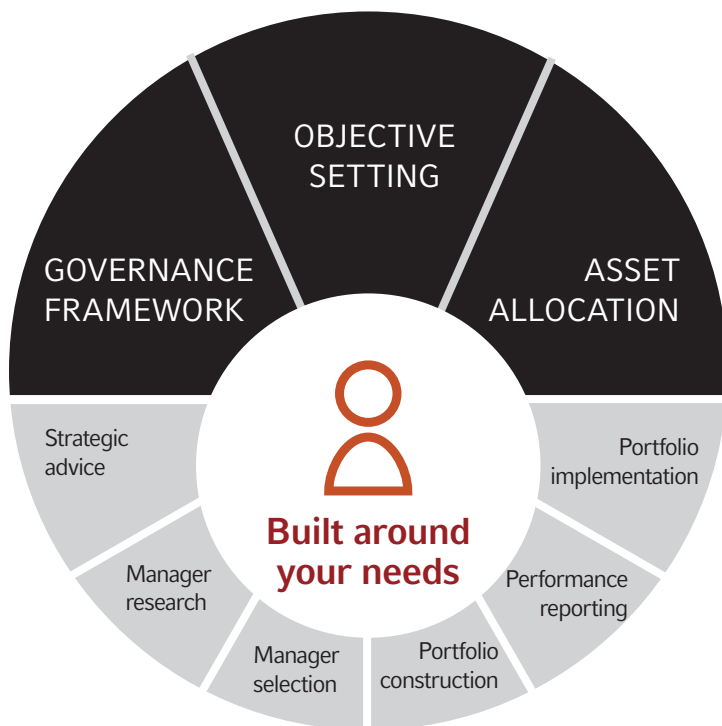


- Removing key-person risk and team pressures with dedicated resources
- Improve monitoring for the risk, performance and costs of each mandate
- Tailoring risk and return to meet shifting liabilities and investment goals

# Built around your needs

Our focus is on the tools required to deliver outcomes for insurers

Every organisation has unique needs and a specific governance and operating model. That's why our approach is deliberately flexible. You determine the level of delegation and we take care of the rest, evolving with you as your needs change.



## Robust systems and tools

Tools and systems, including reporting, stress and scenario testing and advanced risk analytics enabling improved implementation efficiency.

## Investment expertise

Long track record in multi-asset and unconstrained fixed income utilising our open architecture approach and our dedicated manager research and strategy teams.

## Commitment to insurance

Utilising our regulatory understanding we build bespoke insurance solutions including cost accounting, asset liability management and guidance on SCR contracts.

## Benefitting from an integrated approach to ESG

- ✓ ESG factors impact security prices
- ✓ A deep understanding of how ESG factors impact security prices is value-adding to a skilful investment process
- ✓ Embedding ESG considerations into a firm's culture and process improves the likelihood of prolonged and successful investing
- ✓ Active ownership is an effective tool for improving investment outcomes

# Experienced team

Global asset manager with dedicated investment management capabilities for insurers



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## GLOBALLY SUPPORTED BY

**85**  
PORTFOLIO  
MANAGERS

**38**  
MANAGER  
RESEARCH

**22**  
TRADERS

**22**  
CLIENT  
TEAM

Economist / Capital market  
Resources client services / Legal /  
Operations / Product

**1314**  
Professionals supporting the  
delivery of services

Manager research / Customised  
Portfolio Solutions / Consultant  
relations / Performance

Signatory of:



Any past performance is not necessarily a guide to future performance.

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