

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

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



## US FIXED INCOME TEAM

- 80 investment professionals
  - 35 portfolio managers
  - 24 credit analysts
  - 21 years' industry experience
  - 14 years at Insight

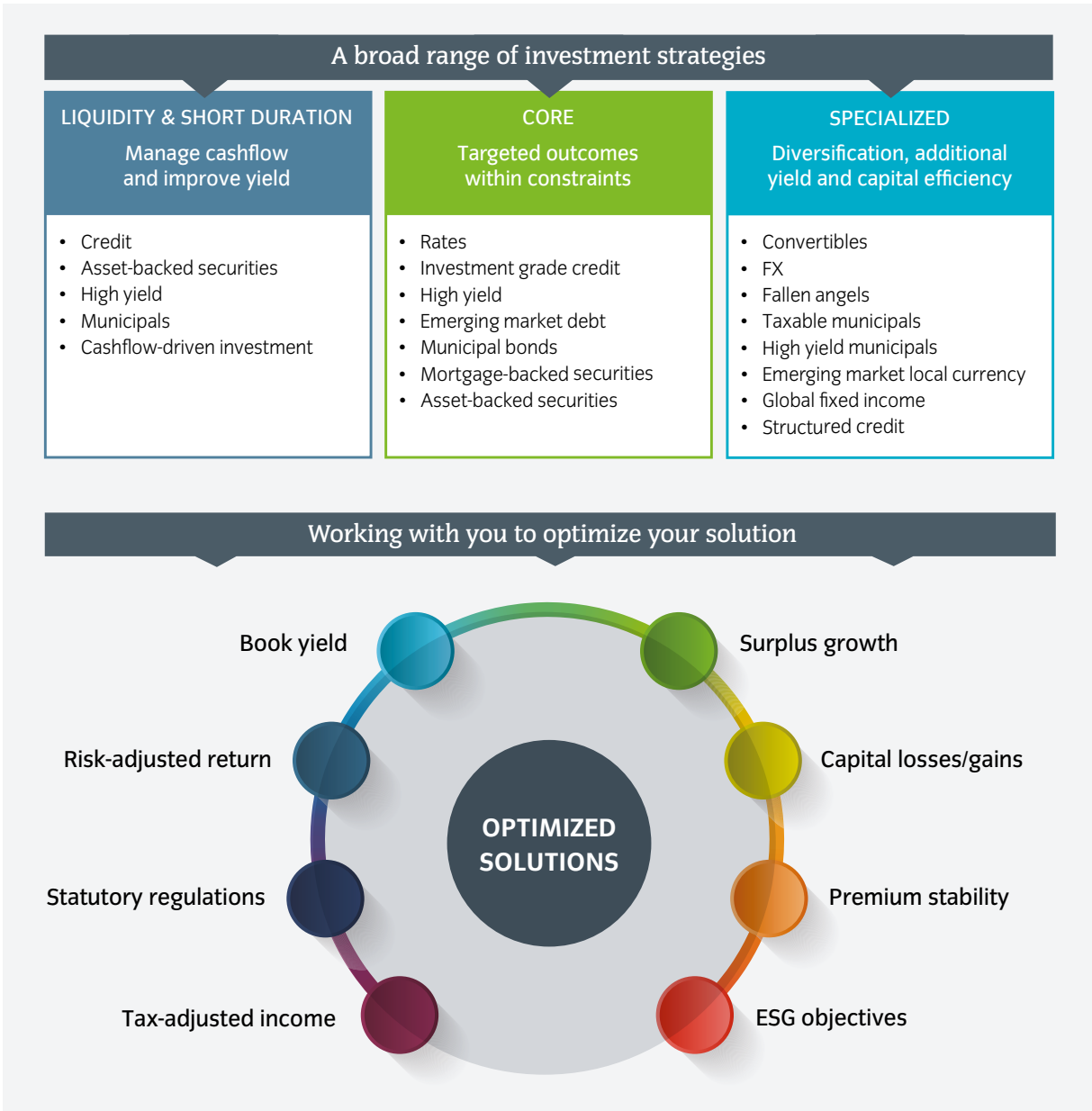
## GLOBAL FIXED INCOME

- 167 investment professionals
  - 71 portfolio managers
  - 48 credit analysts
  - 19 years' industry experience
  - 12 years at Insight

<sup>1</sup> As of September 30, 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.

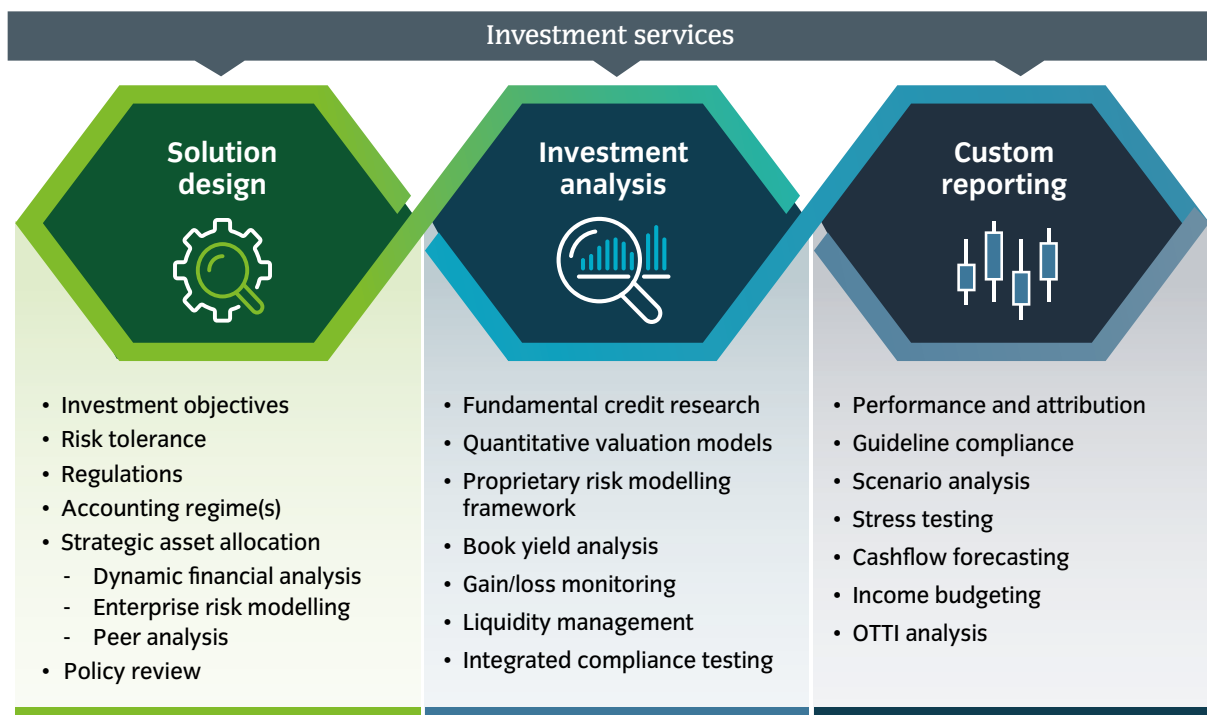


Insight makes no assurances that performance targets will be achieved. Return targets do not reflect advisory fees and other expenses. Please refer to the targeted returns disclosures at the back of this document. Diversification cannot ensure a profit or protect against loss in declining markets. All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



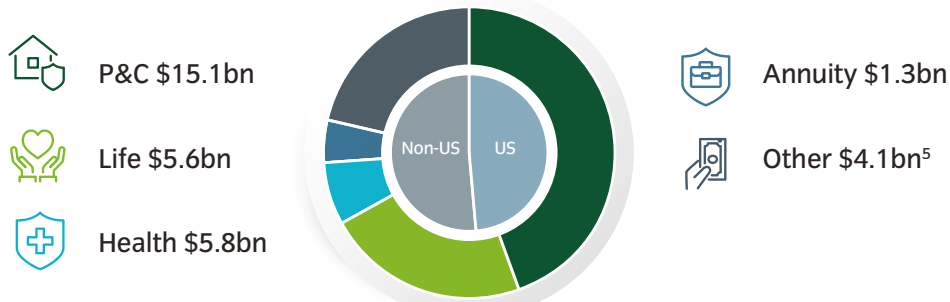
# ABOUT US

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



Extensive experience serving US insurers

\$31.9bn / 80 insurance clients<sup>4</sup>



<sup>3</sup> As of 30 September 2025. AUM are represented by the value of cash securities and other economic exposure managed for clients. Where the methodology defines it, some asset reporting focuses on cash securities only. Figures shown in JPY. FX rates as per WM Reuters 4pm spot rates. Reflects the AUM of Insight, the corporate brand for certain companies operated by Insight Investment Management Limited (IIML). Insight includes, among others, Insight Investment Management (Global) Limited (IIMG), Insight Investment International Limited (IIL), Insight Investment Management (Europe) Limited (IIMEL) and Insight North America LLC (INA), each of which provides asset management services. <sup>4</sup> Outside pie represents number of entities for each corresponding category, by colour. Internal pie shows geographical split of clients. Some clients may have multiple types of insurance mandate. <sup>5</sup> Other includes: Financial Institutions, Corporate (pension fund), Platform, Subadvisory and Local authority/municipal.



## FIND OUT MORE

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