

## Provide Better Investment Outcomes with PFaroe™ Insurance

### Leverage expertise, deliver relevant insights, win more business

PFaroe Insurance is an easy-to-use SaaS solution for asset managers and consultants working with Insurance clients. Designed for the unique investment needs of insurers, PFaroe Insurance delivers comprehensive analytics that enable you to align investments to your client's liabilities, planning objectives and risk profile – and bring complex asset liability models and data to life.

### Address customized client requirements

Insurers have different investment objectives and require investment opportunities and risks to be viewed within their respective parameters. PFaroe Insurance helps provide better investment outcomes by enabling you to test asset allocation decisions and risk management strategies according to each insurer's risk framework and constraints.

It offers a multitude of features including but not limited to:

**Strategy comparison:**

Compare risk and return across a range of different investment strategies or asset allocations

**Balance sheet projections:**

Multi-period projection of assets and liabilities using Moody's economic scenario modelling framework

**Stress testing:**

Calculate the balance sheet risk and return trade-offs by testing different investment strategies across a broad range of public and private market assets

**Analysis:**

Understand the impact of changes to investment strategies across a wide range of insurance risk metrics.

### Experience visible benefits

PFaroe Insurance delivers analytics designed for insurers' needs, allowing you to create impressive pitches based on an insurer's current investment portfolio, financial objectives and risk profile. It enables you to demonstrate the value proposition of investment strategies against a wide range of insurance metrics, including economic, financial, capital, and liquidity.

### Cultivate stronger client engagement

With PFaroe Insurance, you can access real-time analytics that make complicated concepts simple. By enabling you to respond quickly and interact dynamically with clients, as well as develop engaging and relevant reports and presentations, you can cultivate stronger relationships and win more business.

Access Moody's Analytics economic data, models and forecasts

Moody's Analytics offers global coverage of public and private market investments, real assets and structured credit – allowing you to illustrate the impact of cross-asset class exposures. Our market-leading Climate Pathways service can help build investment solutions aligned to your client's carbon transition objectives.

Enhance reporting and governance

Thanks to PFaroe Insurance's advanced analytics, you can regularly test the effectiveness of risk management strategies to evolve solutions over time, as well as consider various regulatory regimes, including Solvency 2, RBC, LICAT, among others.

Increase efficiency and productivity to scale operations

Using a comprehensive platform for risk analytics and reporting for all clients, you can increase operational capacity among your team – helping you to execute asset allocation exercises efficiently, reduce the cost and complexities of building internal tools and limit manual errors.

How can PFaroe Insurance help your business?

|                                              | ASSET MANAGERS | CONSULTANTS |
|----------------------------------------------|----------------|-------------|
| Monitor solution effectiveness               | ✓              | ✓           |
| More efficient client reporting              | ✓              | ✓           |
| Scale your operations                        | ✓              | ✓           |
| Capitalize on market opportunities           | ✓              | ✓           |
| Improve client response times                | ✓              | ✓           |
| Automate bespoke client reporting            | ✓              | ✓           |
| Eliminate obsolete systems                   | ✓              | ✓           |
| Structure better solutions                   | ✓              | ✓           |
| Demonstrate holistic risk expertise          | ✓              | ✓           |
| Test investment portfolios                   | ✓              | ✓           |
| Optimize performance to risk targets         | ✓              | ✓           |
| Create impressive pitches                    | ✓              | ✓           |
| Demonstrate strategic value                  | ✓              | ✓           |
| Manage portfolio growth to spending targets  | ✓              | ✓           |
| Reduce errors and eliminate manual processes | ✓              | ✓           |
| Reduce key person risk                       | ✓              | ✓           |

CONTACT US

To learn more about Moody's Analytics award-winning PFaroe solutions, visit [pfaroe.moodyanalytics.com](https://pfaroe.moodyanalytics.com) and complete the contact us form.