

INSIGHT INVESTMENT PROFILE

INSIGHT INVESTMENT IS EUROPE'S FOURTH LARGEST INVESTMENT MANAGER¹, MANAGING OVER £648BN IN ASSETS² FOR PENSION FUNDS, INSURERS, SOVEREIGN WEALTH FUNDS AND FINANCIAL INSTITUTIONS.

As a specialist asset manager, we aim to deliver consistent and repeatable performance by focusing only on those things we believe we can do well, which include risk-management strategies such as liability-driven investment (LDI), fixed income, currency risk management and multi-asset investment.

Insight is headquartered in London, with other key offices in New York, Boston, San Francisco, Dublin, Frankfurt, Manchester, Sydney and Tokyo, and employs 1,145³ people including 285 investment professionals. We are owned by The Bank of New York Mellon Corporation (BNY Mellon) and have investment decision-making autonomy, operating with an independent management structure and boards. As part of BNY Mellon's multi-boutique structure, Insight has the backing of a sound global financial institution for which asset management is a core strategic priority.

OUR COMPANY

Insight has a clear mission and purpose to offer investors a different approach to achieving their investment goals; one that prioritises the certainty of meeting their chosen objectives in contrast to the traditional focus on maximising return and minimising volatility.

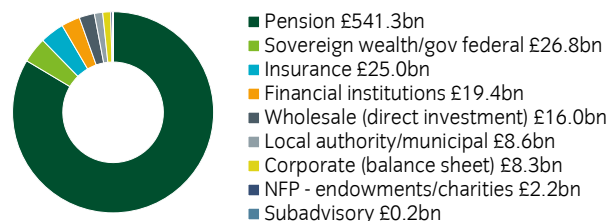
Since our launch in 2002, our partnership approach has enabled significant growth driven by client advocacy, making Insight a leading force in investment management. We have been recognised as a 2023 Quality Leader for overall UK Institutional Investment Management Service by Coalition Greenwich⁴.

ASSETS UNDER MANAGEMENT²

Figure 1: By investment area



Figure 2: By client type



¹ Source: IPE's 'Top 500 Asset Managers' survey, June 2023. Insight is ranked fourth out of the top 120 European institutional managers by total AUM for external Europe-domiciled institutional clients.

² As at 31 December 2023. Assets under management (AUM) are represented by the value of cash securities and other economic exposure managed for clients. Figures shown in GBP. 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 (IIIL), Insight Investment Management (Europe) Limited (IIMEL) and Insight North America LLC (INA), each of which provides asset management services.

³ Global totals including employees from all regions. Includes employees of Insight North America LLC (INA) which provides asset management services as part of Insight, the corporate brand for certain companies operated by Insight Investment Management Limited (IIML).

⁴ Overall UK Institutional Investment Management Service results from Coalition Greenwich Voice of Client - UK Institutional Investors Study 2013 to 2023; in 2023 Insight was ranked first, cited by 66 clients out of 178 total respondents covering all asset/mandate types.

OUR EXPERTISE⁵

Risk management and liability-driven investment

Insight's leadership in risk management and LDI is built on years of experience helping pension schemes, large and small, to develop and implement robust long-term funding strategies focused on their endgame objectives.

- Our LDI investment team consists of 64 LDI specialists covering every component of the design, implementation and management of a successful risk management strategy.
- In 2023, Insight was ranked in first place for Overall LDI Quality for the 13th consecutive year with UK Investment Consultants⁶.
- Since introducing our LDI capability in 2004, we have developed new solutions relevant for pension schemes including a longevity risk hedging platform and an integrated approach to help pension schemes manage liability, return and cashflow risks.

Fixed income and cash

Insight's expertise spans the spectrum of global fixed income opportunities and includes strategies such as global credit, buy and maintain, systematic fixed income and global absolute return bonds. The team also manages a wide range of US strategies, including stable value, core, core plus, corporate, intermediate, select income, long duration and municipal fixed income in the world's biggest and most diverse credit market.

- Our Fixed Income Group manages £185.6bn in fixed income assets through an experienced and well-resourced team of 169 fixed income specialists managing assets against a range of traditional and highly bespoke benchmarks.
- In 2023, and in eight of the last 10 years, Insight was ranked in first place for Overall Quality in Fixed Income by UK investment consultants⁶.
- Our combined global secured lending and loans capability gives Insight a strong position in the space of low-default, illiquid credit investments. We also manage short duration, high-quality portfolios for public entities' operating cash assets, tailored to their specific cashflow and risk tolerances.

Currency

Insight offers a range of strategies that aim to provide effective management of foreign currency exposures, including active currency overlay and hedging strategies to manage currency risk and cashflows in international investment portfolios. These model-driven strategies are tailored to meet the specific needs of large, sophisticated investors. In addition, Insight also provides access to strategies which aim to generate alpha from currency positions.

- Our Currency Solutions Team has managed currency solutions for institutional investors since 1991.
- The Team manages £36.7bn of assets and consists of 22 members with average experience of 20 years.
- Our approach consists of three blocks: strategies focusing on passive hedging, dynamic hedging, and generating absolute returns.

Multi-asset

Insight's multi-asset approach is designed to access an opportunity set broad enough to give us high levels of confidence that we can deliver a smoother path towards our targeted returns, through a wide range of market environments.

- A distinguishing feature of our approach is that we access traditional market-based returns, as well as a range of alternative strategies which are generally less correlated with broad asset class returns.
- Our flagship multi-asset strategy launched in December 2004 and has a track record that predates the global financial crisis.
- Our Multi-Asset Strategy Group is formed of 11 investment professionals with an average of over 17 years' industry experience. The Group draws on the knowledge and expertise of Insight's 285 investment professionals to help design its solutions.

Responsible investment

Insight believes all risks, including environmental, social and governance (ESG) risks, can affect the value of an investment and therefore should be considered in investment decisions where possible and relevant. Many clients also wish to pursue sustainability and positive impact outcomes, and we have developed strategies to enable them to do so.

- Insight was a founding signatory to the UN-supported Principles for Responsible Investment (PRI) in 2006, and is a signatory to the [UK Stewardship Code](#)⁷.
- We have been seeking to improve the integration of relevant and material ESG considerations into decision-making processes. Our Prime ESG ratings aim to more accurately and reliably reflect the risks that companies and countries face.
- We believe engagement with issuers can help us to better understand material ESG risks. In 2023, we conducted 984 engagements, of which the majority included some form of ESG dialogue. These included 148 deep-dive engagements focused on ESG issues.

⁵ As at 31 December 2023.

⁶ Source: Coalition Greenwich 2023 UK Investment Consultant Research. LDI results are based on interviews with 10 UK consultants evaluating LDI. Coalition Greenwich 2023 UK Investment Consultant Research. Fixed income results are based on interviews with 11 UK consultants evaluating fixed income managers. Greenwich Quality Index Overall is a composite of Investment and Service scores.

⁷ The linked document includes disclosures required under the Shareholder Rights Directive (SRD) II relevant to Insight Investment Management (Europe) Limited.

IMPORTANT INFORMATION

RISK DISCLOSURES

Past performance is not indicative of future results. Investment in any strategy involves a risk of loss which may partly be due to exchange rate fluctuations.

Some products and services that Insight Investment has expertise in are only available to professional and qualified persons in certain named countries that meet certain criteria. Such products and services may be available through different members of the Insight Investment group.

FIND OUT MORE

Institutional Business Development

businessdevelopment@insightinvestment.com
+44 20 7321 1552

European Business Development

europe@insightinvestment.com
+49 69 12014 2650
+44 20 7321 1928

Consultant Relationship Management

consultantrelations@insightinvestment.com
+44 20 7321 1023



@InsightInvestIM



company/insight-investment



www.insightinvestment.com

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