

Optimize Investment Strategies with PFaroe™ Insurance

Leverage expertise, deliver relevant insights, win more business

PFaroe™ Insurance is an easy-to-use SaaS solution for insurers, asset managers and consultants. Designed for the unique investment needs of insurers, PFaroe Insurance delivers comprehensive analytics that enable you to align investments to insurance liabilities, planning objectives and risk profiles, and bring complex asset liability models and data to life.

ADDRESS CUSTOMIZED CLIENT REQUIREMENTS

Insurers have unique investment objectives and constraints, requiring opportunities and risks to be assessed within their specific frameworks. PFaroe Insurance supports informed decision-making by enabling you to evaluate asset allocation strategies and risk management approaches tailored to the specific parameters of your or your client's insurance business.

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



Strategy Comparison

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



Balance Sheet Projections

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



Optimization

Identify asset allocation strategies or investment solutions, that are optimized across multiple financial objectives and risk constraints, over different planning horizons



Stress testing

Calculate the balance sheet risk and return trade-offs by testing different investment strategies across a broad range of asset classes, rebalancing assumptions, economic scenarios



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, capturing assets and liabilities, specific financial objectives and risk profile. PFaroe Insurance provides analytics that captures distinct capital regimes and valuation bases for insurers. It enables you to assess and compare investment strategies against a wide range of insurance metrics, including economic, financial, capital, and liquidity.

SIMPLIFY AND COMMUNICATE COMPLEX IDEAS

Communicate complex ideas to stakeholders with more clarity, accuracy, and simplicity. Generate analytics and reports to meet the needs of a range of stakeholders, increasing operational efficiency and providing the flexibility to deliver measurable outcomes.

ENHANCE CLIENT AND STAKEHOLDER ENGAGEMENT

PFaroe Insurance empowers you to respond swiftly and interact dynamically with management stakeholders and clients. It helps you create engaging, relevant reports and presentations to foster stronger relationships. With advanced analytics and regularly updated model calibrations, PFaroe™ Insurance enables you to test and refine risk management strategies, supporting the development of tailored solutions over time.

DEVELOP INVESTMENT STRATEGIES ALIGNED WITH INSURER'S OBJECTIVES

Providing a 360° view of risk, PFaroe Insurance enables the insurer's investment function or asset management partner to optimize investment strategies or solutions with regards the insurer's distinct asset and liability objectives and risk profile.

DIFFERENTIATE YOUR SERVICES WITH PFAROE INSURANCE

Asset managers and investment advisors can deliver impressive, engaging pitches and use powerful analytics to demonstrate a strong value proposition. PFaroe Insurance enables users to customize analytics and reporting allowing them to differentiate themselves from the competition.

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 OPERATIONAL EFFICIENCIES

Using PFaroe Insurance provides a comprehensive platform for risk analytics and reporting, enabling teams to streamline asset allocation processes, reduce reliance on costly internal tool development, and minimize the risk of manual errors. By improving operational capacity, the platform accounts for growth of activities within your organization.

HOW CAN PFAROE INSURANCE HELP YOUR BUSINESS?

	Insurers	Asset Managers	Consultants
Monitor solution effectiveness	✓	✓	✓
More impactful analytics and reporting	✓	✓	✓
Respond to requests faster and more efficiently	✓	✓	✓
Grow your operations		✓	✓
Capitalize on market opportunities	✓	✓	✓
Structure better solutions	✓	✓	✓
Optimized strategies to fit multiple competing objectives	✓	✓	✓
Eliminate obsolete systems	✓	✓	✓
Demonstrate deeper understanding of client business		✓	✓
Test investment portfolios & solutions	✓	✓	✓
Create impressive pitches		✓	✓
Demonstrate strategic value	✓	✓	✓
Build transition or rebalancing plans which meet constraints: financial, liquidity, capital	✓	✓	✓
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 and complete the contact us form.

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