

Case Study – Capital: Enhancing the Fixed Income Portfolio at a P&C Insurer Using Aon’s Investment Manager Research

The Question



“Are their potential opportunities to enhance fixed income yield and return that we are missing?”

The Approach and Solution

- Aon determined the most suitable third party fixed income managers for the P&C insurer client’s needs and worked with them to create customized sample portfolios that fit with the client’s guidelines and current market opportunities
- Aon also performed asset modeling to determine the optimal mix of fixed income maturities and sectors given the client’s risk tolerance constraints

The Implementation



Aon’s research confirmed that the client could benefit from additional exposure to sectors of the bond market that were previously not used due to lack of in-house expertise



The client’s portfolio going forward will be more competitive with industry peers and more diversified

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