Perform detailed analysis of the insurance industry's investment portfolio and evaluate insurers' investment strategies.

- Analyze the stock, bond and hybrid security holdings of US insurers, reinsurers and groups, industry segments and the industry as a whole.
- Measure the performance of companies' investments and compare it to peers or the total industry.
- Uncover investment opportunities or potential risks.
- Combine current Best's Credit Ratings with investment data to benchmark a company's performance against companies with similar ratings.

### Company Information

**Sample Mutual Insurance Company**

- **A.M. Best Co.**
- **NAIC #** 00000
- **FEIN #** 00-00000000
- **Address:** P.O. Box 12345
  Anytown, NY 12345
- **Web:** www.smpic.com

### Best's Credit Ratings

- **Financial Strength Rating:** A (Stable)
- **Rating:** A (Stable)
- **Affiliation Code:** XV (Publicly owned)
- **Outlook:** Stable
- **Action:** Affirmed
- **Effective Date:** January 23, 2023

### Reports

- **Maturity Report**
- **Comprehensive Investment Report**

### Key Investment Data - Book/Adjusted Carrying Value (2022 Annual Data)

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<tr>
<th>Security Type</th>
<th>Real Estate (Schedule A)</th>
<th>Mortgage Loans (Schedule B)</th>
<th>Long-Term Invested Assets (Schedule BA)</th>
<th>Long-Term Bonds (Schedule D, Part 1)</th>
<th>Preferred Stocks (Schedule D, Part 2, Section 1)</th>
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### Reporting Capabilities

Ready-to-use templates with standard reports are available, along with wizards to create custom reports using the fields of your choice. Templates include:

- **Maturity Report:** View investments by maturity date.
- **Comprehensive Investment Report:** Capture all investment data for a single company or group.
- **Analysis of Bonds:** Review different bond classifications and their contribution to investment income.
- **Investment Income and Capital Gains:** Get a detailed analysis of investment results.
- **Issuer Report:** Search for investments by issuer name or number.
- **CUSIP® Report:** Search for securities by CUSIP number.

Get a quick visual representation of a company's or group's key investment data.
Create reports to analyze companies that own specific investments.

Tools

• “Explore Investments” tools to analyze detailed data reported in Schedules A through E and create templates and customized reports, with multiple layout options for exporting to Excel®

Support

• Access to our template service at no extra cost, as well as assistance from our data support team
• Training webinars

Multiple Delivery Channels

• BestLink®, which offers online access to financial data and insurer analysis
• BestLink for Excel, our downloadable add-in
• BestLink Data Feeds, which transmit filing data (excluding AM Best-created ratios) to the subscriber’s FTP site (additional fee applies)
• AM Best Mobile App, for on-the-go access to premium subscription features

For more information and to request a demonstration:

US/Canada: +1 908 439 2200, option 5 • sales@ambest.com
Europe/Asia-Pacific: +44 20 7397 0290 • europe.sales@ambest.com

Download the AM Best Mobile App.