

INSURANCE ASSET MANAGEMENT

FOCUSED APPROACH

At Miles Capital, everything we do is created from the point of view of you, the insurer. We leverage our three decades of insurance expertise along with our comprehensive asset management prowess to design and deliver clear, flexible, tailored solutions that are in your best interests. We understand the unique objectives, parameters, and regulatory constraints our insurance clients face and offer customized investments to help meet these needs.



Save Time

ADDITIONAL RESOURCES & SERVICES

We provide a full suite of services that add to your capabilities. We are committed to providing unsurpassed service, taking responsibility for your investment portfolio and becoming a part of your organization and team.



Add Value

CAPITAL MARKETS SOLUTIONS

We offer fully customized investing and portfolio management. Think of it as a strategic plan for your investments. We identify the most important goals for your company's assets and then design a fully customized, forward-looking solution to help deliver the investment results that matter to you.



Mitigate Risk

RISK MANAGEMENT

We design portfolios to align with your needs and provide downside risk mitigation. We help provide stable income and predictable cash flows, but are agile enough to take advantage of market opportunities. Dedicated portfolio management constantly evaluates your portfolio, managing risk along the way.



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Strategic Partnership

AN EXTENSION OF YOUR TEAM

Miles Capital provides unparalleled client service, always putting our clients and their needs first. We customize each investment solution and every client knows that their portfolio is not a random assortment of assets or asset classes. We take a comprehensive view of all your business and investment needs and work with you to create a strategic partnership that will provide the opportunity to help meet and exceed your business goals and objectives.

What Does An Outsourced Investment Department Do For You?

Miles Capital is an independent, solutions-focused investment manager, serving as a comprehensive outsourced investment department for insurance clients. We are an extension of your team, creating a complete investment program that is designed uniquely for you. We create customized portfolios and provide a complete list of value-added services.

OBJECTIVES-BASED ASSET ALLOCATION®

We customize the portfolio to align directly with your unique needs.



INVESTMENT POLICY STATEMENT (IPS)

We analyze the asset/liability needs, cash flows, and constraints to develop and codify objectives in the IPS.



EDUCATION & GUIDANCE

We provide ongoing education, training, and market commentary for our client's teams to enhance their depth.



PERFORMANCE MONITORING

We monitor and manage performance continuously, relative to your custom benchmarks, and report to the Board.



FORWARD-LOOKING GLIDE PATHS

We provide forward-looking analysis of business and portfolio metrics that matter.

CAPITAL EFFICIENCY ANALYSIS

We assess the portfolio and each investment recommendation relative to your capital efficiency.

ASSISTANCE TO THE BOARD

Communication includes guidance through challenges or market changes, and participation in strategic planning.

COST CONTROL

We maintain best execution for our clients (goal of lowering trading costs) and aid in custodial search and selection.

Additional Services – All Included At No Additional Costs

CLIENT SERVICES	BANKS	BROKERS	MILES CAPITAL
Fiduciary			√
Scenario Analysis & Stress Testing			√
Liquidity Analysis & Planning			√
Daily Compliance with Investment Policies			√
Peer Financial Review			√
Rating Agency Support & Communication			√
Trading, Best Execution, Settlement Support	√	√	√
Committee / Board Communication and Meetings	√	√	√
Quarterly Insurance Package Reporting			√
Schedule D & OTTI Support			√
Economic Outlook, Strategy & Firm Communications	√	√	√
Custody Search & Liaison Services			√
Operational Support (Including Daily Reconciliation)	√		√
Proxy Voting			√

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