

Variable Annuity

Analyze the VA market with a unified view of fund, sub-account, and sub-advisory data.

Leverage a robust application covering data on over **150,000 sub-accounts** in more than **2,500 variable annuity**, variable life, and variable universal life contracts to understand placement opportunities, fee trends, and new product development.

With distinct data “views”, the application offers a simplified way to separate out fund and sub-account universes or incorporate aspects of both in a single report.

Detailed Insights Through Holistic Market Coverage

- Monitor industry trends and competitor market share using historical asset, flow, and return data going back a decade and updated on a monthly basis.
- Identify sub-advisory mandate opportunities and product gaps within insurance companies’ proprietary funds.
- Determine potential VIT replacements by analyzing subaccount options within VA policies, and segmenting by policies that are actively being sold.
- Analyze fee and expense information using detailed information researched directly from SEC prospectus documents to benchmark against peers.
- Support product development cycle by exploring fund launches and product rationalizations.
- Ability to group data by “Actual Advisor” to make competitive analysis more accurate by combining VIT and sub-advised assets for the same manager.

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