

# Headings & Horizons: CARA<sup>®</sup> Platform

**William E. Rotatori**

*Chairman and Chief Executive Officer:*

Insurance executives today are confronted with an environment where the pace of business is accelerating, information demands are escalating, and capital markets are volatile and unpredictable, and in that environment, they need to have access to timely, reliable information on their investment portfolio to manage their constituencies effectively. Insurance companies are being asked about what's my investment income look like, what are my credit exposures, what are my ESG risks, all these insurance specific things. And unless you incorporate that into the investment technology platform, it's really not going to be that useful.

## {GRAPHIC} INSURANCE COMPANIES NEED TAILORED SOLUTIONS

Off the shelf investment analytic platforms, you know it's round peg in a square hole for insurance companies. You really need to customize it to meet those unique needs.

**Christopher Lech**

*Head of Client Strategy:*

One of the challenges with managing insurance company assets is to be able to manage all the moving parts and considerations of each individual client. And no two insurance company clients are alike. For example, insurance companies can have many different legal entities onshore, offshore. They reside in different regulatory regimes, have different accounting basis's. Interestingly, you can have two insurance companies that might look alike on paper but truly, their unique needs and their goals and objectives and their tolerances can be very, very different. So in order to harness all that information and all those moving parts, you need the tools and technology to do that effectively.

**William:**

## {GRAPHIC} CAPITAL AND RISK ANALYTIC | CARA<sup>®</sup> PLATFORM

Our Capital and Risk Analytic Platform, or CARA<sup>®</sup>, is an integrated suite of insurance focused applications that allows insurance executives to successfully navigate this environment.

**Kelly Sullivan**

*Senior Client Strategist:*

When markets are changing as quickly you need an analytics platform that's going to respond and give you the data that you need right at your fingertips when you need it. The COVID-19 pandemic was a good example of just the robustness of the CARA<sup>®</sup> platform, where clients were able to access COVID impacted sectors and look at their portfolio exposures. Markets move quickly and I would say the CARA<sup>®</sup> platform really gives us a way for clients to keep up with fast moving markets.

**Christopher:**

No one knows when they will need the information in order to make decisions and whether they need to report to constituencies and stakeholders. By having access to the CARA® platform we can empower our clients to make better and more informed decisions. We look to make it easy for our insurance clients to access their portfolio.

**Robert Emery**

Head of Investment Technology:

Our insurance focus is a big differentiator from our insurance accounting, to our regulatory and rating agency support, to our peer reporting. We understand the data and reporting challenges and requirements of insurance companies.

**Chris:**

One of the frustrations we hear in the insurance marketplace is the inconsistency of information that our clients have. NEAM has an integrated technology platform where information is up to date relevant and consistent across all those views and finds its way into the CARA® platform.

**Robert:**

## {GRAPHIC} HOLISTIC AND INTEGRATED APPROACH

And here at NEAM, we use a more holistic and integrated approach so that the systems talk to each other and are consistently updated. External integration extends to all the capital market providers that we have relationships with and need to work with to bring their content onto the platform. These would be custodian banks, other asset managers and market data providers.

**Chris:**

Our clients have access to their information at really three different levels. The first is a high level via the client dashboard. The next level is more granular through the client risk portal and even more detail than that is access to our data warehouse.

**Kelly:**

NEAM's client dashboard combines multiple systems and reports into one consolidated view, so there's no need to spend time stitching reports together to get the information you're looking for. This gives insurance executives the flexibility they need to stay informed.

**Chris:**

In addition to high level snapshots of the portfolio and high-level risk profiling clients could also look at the portfolio at a cusip level, net investment forecasting and use that information to support their liabilities for any reason including asset liability management.

**Robert:**

## {GRAPHIC} SECURE CLOUD BASED SERVICE

NEAM's platform is a secure cloud based service that's available virtually anytime, anywhere. All clients need is an internet browser to gain access.

**Chris:**

No one knows what the future holds, but rest assured is going to be challenging and NEAM is dedicated to invest and develop the CARA<sup>®</sup> platform for the benefits of our clients not only today but tomorrow.

**William:**

By combining the speed, accuracy and robustness of our CARA<sup>®</sup> platform with the seasoned judgment of our investment professionals, we believe we deliver a different client experience. This gives insurance executives the flexibility they need to stay informed. To learn more, visit our website to request a demo of our CARA<sup>®</sup> platform and client dashboard.

[www.neamgroup.com/demo](http://www.neamgroup.com/demo)

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