



3Q 2014

Strategies and Structures Issue

Article Summaries:

Insurance Asset Management

Insurance CIOs are under significant pressure to produce returns within the context of strict regulatory capital standards. For third-party institutional managers seeking business from insurance investment portfolios that outsource asset management functions, it is important to take a holistic approach to build relationships and ultimately garner more assets.

Private Equity

Private equity has rebounded from the global financial crisis and slow economic recovery to prove itself as a robust model for improving companies and delivering attractive long-term returns. This turnaround attracts a growing amount of capital from existing and new investors globally.

Annual Subscription Details:

Subscription Includes:

- Hardcopy
- Softcopy
- Online access to all archived issues
- Exhibits in Excel
- Analyst access

Pricing:

Subscription: \$7,500 (four issues included)

Contact Us:

+1 617-437-0084
info@cerulli.com
www.cerulli.com

Issue Purchase Includes:

- 16 page issue in softcopy
- Exhibits in excel format
- Client support

To Purchase:

Contact Account Management
info@cerulli.com
+1 617-437-0084

or visit www.cerulli.com and select the Purchase tab

\$2,500

Table of Contents

Overview: Vehicle Dynamics

- Investment performance, fees, risks, size, and regulations influence institutions' investment vehicle decisions1
- ☒ Managers' Institutional Product Development Plans, 2014
 - ☒ Fund Structures Most Frequently Requested for Alternative Strategies by Institutional Investors, 2014

Insurance Asset Management: Know Your Audience

- Understanding the unique challenges of insurance general accounts will help institutional asset managers find the most useful strategies and structures.....3
- ☒ Insurers' Current Investment Concerns, 2014
 - ☒ Insurers' Greatest Investment Challenges in the Near Future, 2014
 - ☒ Asset Managers' Average Insurance Client Investment Allocation, 2014

Private Equity: Becoming Mainstream

- Private equity evolves and bifurcates7
- ☒ Private Equity Assets Under Management, 2000–June 2013
 - ☒ Breakdown of Aggregate Capital Currently Invested in Private Equity by Investor Type, June 2013

Quantitative Insights11

Collective Trust Fund Trustee Structure

- ☒ CTF Trustee Banks Choosing State or National Charters, 2014
- ☒ Average Number of CTF Strategies Offered by Asset Managers, 2010–2013

Request for Proposal Team Structure

- ☒ How Asset Managers with Global Distribution Structure Their RFP Teams, 2014
- ☒ Channel Approach to RFP Team Structure, 2014

Request For Proposal Strategies

- ☒ Challenges Related to Completing a RFP, 2014
- ☒ Teams Responsible for Completing Client Due Diligence Questionnaires, 2014

Target-Date Vehicles and Channels

- ☒ Asset Managers' Current and Expected Future Target-Date Business by Vehicle, 2014
- ☒ Current Target-Date Business by Channel, 2014

Custom Target-Date Funds

- ☒ Providing Customized Target-Date Funds, 2014
- ☒ Considerations When Configuring Cost of Custom Solutions, 2014

Breaking into Insurance General Accounts

- ☒ Business Rationale of New Managers/Consultants to Enter Insurance General Accounts, 2014
- ☒ Expected Changes to Insurance Clients' Fixed-Income Allocation in Next Year, 2014