BNY | INVESTMENTS

GETTING TO KNOW INSIGHT INVESTMENT

Our leading fixed income specialist seeking to deliver consistent outcomes through intentional investing

As of September 30, 2026

TIME-TESTED EXPERIENCE

FOCUSED ON PRECISE OUTCOMES

CLIENT-CENTRIC SOLUTIONS

By the Numbers

$816.0B ASSETS UNDER MANAGEMENT[1]

#1 Leader in Fixed Income by Consultants[2]

#1 Global leader in LDI Solutions[3]

1987 Managing separate accounts and customized wealth strategies[4]

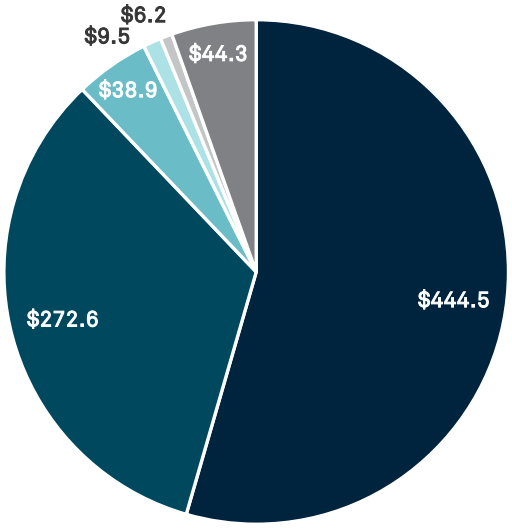
900+ Institutional clients trust us with their assets[4]

$39B Municipal AUM[4]

$445B Custom Solutions AUM[4]

A Trusted Leader in Fixed Income[5]

Comprehensive fixed income expertise across sectors and custom solutions for some of the most sophisticated clients in the world[6]



- **Solutions**
  - LDI
  - CDI
  - Insurance
  - Currency
- **Taxable Fixed Income**
  - Core
  - Corporate
  - Core Plus
  - Select Income
  - Global
  - Short Duration
- **Municipal Fixed Income**
  - Short
  - Long
  - Opportunistic
  - Intermediate
  - High Yield
  - State Specific
- **Systematic Fixed Income**
  - High Yield
  - Fallen Angels
  - Emerging Markets
  - Investment Grade
- **Multi-Asset**
- **Currency Management**

See page two for important disclosures.

The Power of Intention

TIME-TESTED EXPERTISE

Backed by nearly a century-long legacy in fixed income and a global footprint, Insight has effectively navigated full market cycles

INTENTIONAL ALPHA

Combining macroeconomic insights and fundamental credit research, Insight takes intentional positions to drive risk-adjusted alpha and uncorrelated return to specific objectives

SEEKING CONSISTENT OUTCOMES

Focused on delivering consistent outcomes that can serve as a reliable ballast in client portfolios to navigate different markets over time

BNY Investments

We are a global asset manager with $2.2 trillion in assets, underpinned by the strength and resilience of BNY with its 240-year history. We offer investment solutions to meet the needs of individual, intermediary and institutional clients, leveraging asset class specialists with distinct philosophies.[7]

Endnotes:

1. As of September 30, 2026. Assets under management (AUM) are represented by the value of the client's assets and liabilities Insight is asked to manage. Insight North America (INA) is part of 'Insight' or 'Insight Investment', the corporate brand for certain asset management companies operated by Insight Investment Management Limited including, among others, Insight Investment Management (Global) Limited (IIMG), Insight Investment International Limited (IIIL) and Insight Investment Management (Europe) Limited (IIMEL). Figures shown in USD. Please note that there may be a difference in Insight's total firm AUM reported in the materials presented here vs. external Insight materials, solely due to timing differences.
2. Overall Quality Index results from Greenwich Associates' 2025 UK survey Results are based on interviews with 8 UK consultants evaluating fixed income managers. Greenwich Quality Index (GQI) scores for each evaluator range from 1,000='Excellent' to 0='Poor' with a population mean of 500. Greenwich Quality Index Overall is a composite of Investment and Service scores. The rankings and awards presented above were given to Insight Investment Management (Global) Limited, an affiliate company of Insight North America and Insight Investment International Limited.
3. Source: P&I 'Largest Money Managers' survey, published June 16, 2025. Insight is ranked number one for total worldwide AUM as of December 31, 2024, for the 'Managers of LDI Strategies' and 'Managers of LDI Strategies for Retirement Plans' categories.
4. Source: Insight Investment; as of September 30, 2026.
5. The use of "trusted leader" in this document is based on the manager's significant AUM ($816.0B as of September 30, 2026) and long history in managing other fixed income accounts, including other pooled funds, for clients.
6. As of September 30, 2026. Assets under management (AUM) are represented by the value of the client's assets and liabilities Insight is asked to manage. These will primarily be the mark-to-market value of securities managed on behalf of clients, including collateral if applicable. Where a client mandate requires Insight to manage some or all of a client's liabilities (e.g. LDI strategies), AUM will be equal to the value of the client specific liability benchmark and/or the notional value of other risk exposure through the use of derivatives. Where the methodology defines it, some asset reporting focuses on cash securities only. Insight North America (INA) is part of 'Insight' or 'Insight Investment', the corporate brand for certain asset management companies operated by Insight Investment Management Limited including, among others, Insight Investment Management (Global) Limited (IIMG) and Insight Investment Management (Europe) Limited (IIMEL). Advisory services referenced herein are available in the US only through INA. Legal entity Insight North America LLC's AUM is $162.3bn as of September 30, 2026. Figures shown in USD. FX rates as per WM Reuters 4pm spot rates. Includes $3.8bn attributable to certain accounts managed by Insight's affiliate, BNY Mellon, National Association, for which certain Insight investment personnel act as dual officers. Such accounts pursue the same or similar investment strategies to those pursued by Insight clients. Includes employees of Insight North America LLC and its affiliates, which provide asset management services as part of Insight, the corporate brand for certain companies operated by Insight Investment Management Limited (IIML).
7. Source: BNY Investments; as of September 30, 2026.

Important information

All investments involve risk including loss of principal. Certain investments involve greater or unique risks that should be considered along with the objectives, fees, and expenses before investing.

No investment strategy or risk management technique can guarantee returns or eliminate risk in any market environment.

Bonds are subject to interest-rate, credit, liquidity, call and market risks, to varying degrees. Generally, all other factors being equal, bond prices are inversely related to interest-rate changes and rate increases can cause price declines. **High yield bonds** are subject to increased credit risk and are considered speculative in terms of the issuer's perceived ability to continue making interest payments on a timely basis and to repay principal upon maturity. **Management risk** is the risk that the investment techniques and risk analyses applied will not produce the desired results and that certain policies or developments may affect the investment techniques available to managing certain strategies. **Municipal income** may be subject to state and local taxes. Some income may be subject to the federal alternative minimum tax for certain investors. Capital gains, if any, are taxable. **Alpha** is an investment's excess return compared to its expected return, given its risk level (beta), essentially measuring a manager's "skill" or an investment's outperformance beyond market movements. **Diversification cannot assure a profit or protect against loss.**

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