

# Marsh Captive Solutions benchmarking services



More and more companies are finding captives to be a strategically important corporate asset, one which serves as an effective risk and financial control tool and raises the visibility of risk management to the highest levels.

While each captive is unique, the questions that many of today's captive owners would like to know usually include: "How can my captive deliver more value? What are others doing with their captives? How can I make better use of this asset?"

Using more than 125,000 data points, Marsh Captive Solutions can help you answer these questions through our dedicated, web-based global benchmarking portal. Our nearly 500 global colleagues can assist you with comparing your own program against others in the same or similar industry, region, or company size to make sure your captive program is delivering the best value for your organization. We can even build customized benchmarking reports for your specific captives, showing how they match up against your peers.

As the leading captive solutions provider, with more than 1,500 captives under management, we can deliver tremendous insights through our benchmarking portal that enable you to improve captive efficiency, identify additional areas of potential coverage, and provide data-backed recommendations to the C-suite.



## OPTIMIZING FINANCIAL EFFICIENCY: CLIENT EXAMPLE

A client was seeking to make sure it was optimizing the financial efficiency of its captive. As a pre-qualifying step, the Marsh Captive Solutions team looked at the summary financial information, including key ratios, of the client's existing captive compared to aggregate industry results. This comparison of results objectively reinforced an assertion the team was investigating: that the client might be able to increase investments in loans to affiliates as a means of more effectively using its captive assets.

After a discussion of the benchmarking portal findings and the team's recommendation, the client decided to formally assess a change in its investment mix. This led the client to engage outside counsel and Marsh Captive Solutions' advisory colleagues in a project to evaluate structural changes that would enhance the net present value (NPV) advantage of its captive, which resulted in preliminary indications of more than US\$5 million per year of NPV improvement.

## KEY FEATURES OF THE PORTAL

With our new benchmarking portal, Marsh Captive Solutions colleagues now have the ability to provide you with:

- Key benchmarking metrics with industry reports.
- Printable “placemat” reports that can be used with your management teams.
- Tables, graphs, and charts for presentations and board meetings.
- Comparison of your profile data against your industry.
- Comparison of your financial data and ratios against industry averages.
- Data that has been filtered precisely based on any custom questions needed from the benchmarking data.
- Insights on variances against the Marsh Captive Ratio Analysis (MACRA) model.
- Evaluation and interpretation on all of the above to help you improve the value of your captive.

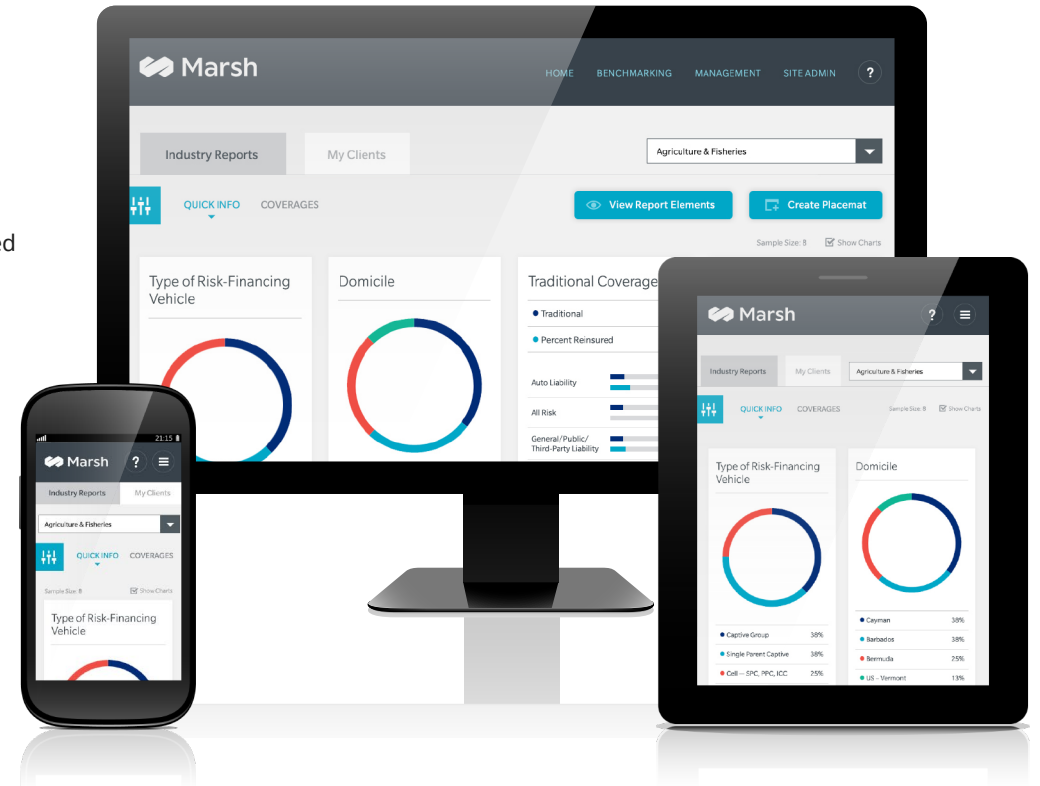
## COMPANY CONFIDENTIALITY IN THE PORTAL

Client confidentiality is of the utmost importance. Here are some of the ways Marsh Captive Solutions’ benchmarking team protects your information:

- Data access restrictions prevent unauthorized access.
- Benchmarking reports and analysis require a minimum of three peers, ensuring clients a level of anonymity.

One-in-four captives worldwide are managed by Marsh and captive utilization continues to grow across companies of all shapes and sizes. Is your company among those taking full advantage of the opportunities captives afford?

**For more information, please contact your local Marsh representative or visit [marsh.com](http://marsh.com).**





## About Marsh

Marsh is the world's leading insurance broker and risk advisor. With around 45,000 colleagues operating in 130 countries, Marsh serves commercial and individual clients with data-driven risk solutions and advisory services. Marsh is a business of Marsh McLennan (NYSE: MMC), the world's leading professional services firm in the areas of risk, strategy and people. With annual revenue nearly \$20 billion, Marsh McLennan helps clients navigate an increasingly dynamic and complex environment through four market-leading businesses: Marsh, Guy Carpenter, Mercer and Oliver Wyman. For more information, visit [marsh.com](https://www.marsh.com), follow us on [LinkedIn](#) and [Twitter](#) or subscribe to [BRINK](#).

Marsh is a business of Marsh McLennan.

This document and any recommendations, analysis, or advice provided by Marsh (collectively, the "Marsh Analysis") are not intended to be taken as advice regarding any individual situation and should not be relied upon as such. The information contained herein is based on sources we believe reliable, but we make no representation or warranty as to its accuracy. Marsh shall have no obligation to update the Marsh Analysis and shall have no liability to you or any other party arising out of this publication or any matter contained herein. Any statements concerning actuarial, tax, accounting, or legal matters are based solely on our experience as insurance brokers and risk consultants and are not to be relied upon as actuarial, tax, accounting, or legal advice, for which you should consult your own professional advisors. Any modeling, analytics, or projections are subject to inherent uncertainty, and the Marsh Analysis could be materially affected if any underlying assumptions, conditions, information, or factors are inaccurate or incomplete or should change. Marsh makes no representation or warranty concerning the application of policy wording or the financial condition or solvency of insurers or reinsurers. Marsh makes no assurances regarding the availability, cost, or terms of insurance coverage. Although Marsh may provide advice and recommendations, all decisions regarding the amount, type or terms of coverage are the ultimate responsibility of the insurance purchaser, who must decide on the specific coverage that is appropriate to its particular circumstances and financial position.

1166 Avenue of the Americas, New York 10036

Copyright © 2022, Marsh LLC. All rights reserved. MA16-13845 860963294