



M&G Investments selects Ortec Finance's GLASS modelling platform to enhance its investment solutions offering for insurance clients.

London, UK – 11 June 2024 – M&G Investments, a leading international asset manager and part of M&G plc, has announced a strategic collaboration with Ortec Finance, an industry-leading provider of investment modelling solutions for insurers. The collaboration enables M&G to leverage Ortec Finance's advanced Economic Scenario Generator (ESG) and Strategic Asset Allocation (SAA) tooling when bringing tailored investment strategies to their insurance clients.

M&G's strategic collaboration with Ortec Finance underscores its commitment to innovation and excellence in serving insurance clients. By harnessing the power of advanced analytics and scenario modeling, M&G continues to deliver investment solutions that help insurance companies navigate uncertainty and achieve their long-term financial goals.

Ortec Finance's GLASS tool is industry-leading for insurers and designed to provide comprehensive economic scenarios alongside asset allocation insights. By incorporating these advanced tools into its investment solution design, M&G can offer insurance clients enhanced risk management capabilities and tailored investment strategies that align with each insurer's specific objectives and constraints. The platform will also be used in other parts of the business as M&G Investments look to build out end-game pension solutions and strategies for other institutional clients.

Building on M&G's in-depth fundamental analysis approach to investing, utilizing Ortec Finance's advanced modelling techniques enables M&G to help insurers optimize their asset allocation decisions, whilst capturing the regulatory constraints and capital requirements they face. Working directly with each insurer, M&G aims to quantitatively highlight the risks & benefits of various investment strategies within the context of clients' risk-return objectives and overall balance sheet position.

"We are excited to collaborate with Ortec Finance to enhance our investment offering for insurance clients," said **Russell Lee, Head of Global Insurance Solutions at M&G**. "As insurers face increasingly complex challenges in managing their investment portfolios, we recognize the importance of providing robust, innovative, technical solutions that keep pace with evolving regulatory change and enhance our competitive edge in the market."

"We are delighted to support M&G Investments in building innovative solutions to help meet the evolving needs of their clients," said **Hamish Bailey, Head of Insurance & Investment Management and Managing Director UK, at Ortec Finance**. "The power and flexibility of the GLASS system enables the customization of Strategic Asset Allocation to suit the unique requirements of clients. By integrating insurance-specific metrics, it ensures that key factors related to risk management are fully considered in the modelling process."

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For more information, please contact:

Hamish Bailey

UK Managing Director, Head of Insurance and Investment

Ortec Finance

e: Hamish.Bailey@ortec-finance.com

About M&G Investments

M&G Investments is part of M&G plc, a savings and investment business which was formed in 2017 through the merger of Prudential plc's UK and Europe savings and insurance operation and M&G, its wholly owned international investment manager. M&G plc listed as an independent company on the London Stock Exchange in October 2019 and has £343.5 billion of assets under management (as at 31 December 2023). M&G plc has customers in the UK, Europe, the Americas and Asia, including individual savers and investors, life insurance policy holders and pension scheme members.

For nearly nine decades M&G Investments has been helping its customers to prosper by putting investments to work, which in turn creates jobs, homes and vital infrastructure in the real economy. Its investment solutions span equities, fixed income, multi asset, cash, private debt, infrastructure and real estate.

M&G recognises the importance of responsible investing and is a signatory to the United Nations Principles for Responsible Investment (UNPRI) and is a member of the Climate Bonds Initiative Partners Programme.

M&G plc has committed to achieve net zero carbon emissions on its total book of assets under management and administration by 2050 and committed to reduce operational carbon emissions as a corporate entity to net zero by 2030.

For more information, please visit: <https://global.mandg.com/>

About Ortec Finance

[Ortec Finance](#) is the leading provider of technology and solutions for risk and return management. It is Ortec Finance's purpose to enable people to manage the complexity of investment decisions.

This is accomplished via the delivery of leading technologies and solutions for investment decision-making to financial institutions around the world. Ortec Finance's strength lies in an effective combination of advanced models, innovative technology, and in-depth market knowledge. This combination of skills and expertise supports investment professionals in achieving a better risk-return ratio and thus better results.

Headquartered in Rotterdam, The Netherlands, Ortec Finance has offices in Amsterdam, London, Toronto, Zurich, New York, Singapore, and Melbourne. Ortec Finance helps 600+ clients manage their \$15 trillion assets under management.