

## Model of Excellence Profile – Analytic Reporting for Annuities

Company Name:	Depository Trust & Clearing Corp.	ICG#	11327
Address:	55 Water Street, New York, NY 10041		
Product Name:	Analytic Reporting for Annuities		
URL:	www.dtcc.com/annuities	Managing Director:	Adam Bryan

### Business and Product Overview

Business Information Framework Classification	<i>Evaluate:</i> Reference and Intelligence <i>Benchmark:</i> Industry Benchmarks	<i>Business Model:</i> Subscription – Subscription
	<i>User-Generated:</i> Closed Data Pool <i>Clearinghouse &amp; Exchange:</i> Experiential	<i>Distribution Model</i> Direct Sales – Direct Sales: Captive

Company Overview	<p>The Insurance and Retirement services division of DTCC is the central messaging connection for annuity and life insurance transactions, enabling insurance companies to provide brokers/dealers with daily financial transaction information. Analytic Reporting for Annuities is an online application that provides deep and unique insight into who is selling what, where and how much in the annuities business, delivered through a powerful and elegant user interface.</p>
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Product/Service Description	<p>DTCC knows a lot about moving data as the central clearinghouse for securities transactions in equities, fixed income, annuities, mutual funds and more. In fact last year, DTCC processed financial transactions valued at \$1.66 <i>quadrillion</i>, all with the high precision, accuracy and efficiencies required of financial transactions.</p> <p>Despite the huge volume of high-value information it processes, DTCC has historically not commercialized this information. This is beginning to change, and the new Analytic Reporting for Annuities application is the first move in this direction. The online application provides two distinct user roles within its interfaces -- one for insurance companies, and one for broker/dealers, so each audience sees only the information it needs to see, presented in the way it needs to use the data.</p> <p>The product allows users to see sales by geography, insurance company, annuity product, broker/dealer and financial advisor, and annuity market cash inflows and outflows on a monthly basis, with history back to early 2010 that will build over time. While DTCC doesn't capture every annuity transaction, it captures a very large percentage, enough to provide meaningful and dependable industry benchmarks. Beyond high-level sales statistics, users can drill-down into the data to see what is selling, who is selling it, and what markets are most active. The product can be used for sales force deployment, sales and marketing, product development, competitive intelligence and even compliance.</p> <p>This early move by DTCC from an information processor to an information provider is a natural and obvious evolution, and ICG continues to see companies that have optimized themselves for</p>
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one activity begin to realize that as a side product of that activity they are collecting enormous amounts of high-value data that can be readily transformed into useful and lucrative information products. Companies that serve as central information exchanges for specific industries are uniquely privileged in this regard.

Year Founded:	1973	BizDev Contact:	Andrew Blumberg
Employees:	3,000 (estimated)	Main Telephone:	212-855-1000
Profile Date:	July, 2011	Primary Market Served:	52 - Finance and Insurance
Ownership:	Private	Funding Source:	Private
MofE Class:	2011	MofE Status:	NOMINEE

