

## AAM Case Study

AAM is an insurance-focused investment management firm with more than 100 clients across property and casualty, health and life, and captive business segments.

Since 2015, Clearwater Analytics has been a trusted partner and crucial piece of AAM's differentiated client experience. Clearwater provides AAM and its end clients with accessible, comprehensive portfolio information that is updated daily. This level of transparency drives informed decision-making for AAM's portfolio managers and empowers their clients to actively monitor their portfolios, ask questions, and know where they stand with their investments.

Working together, AAM's in-house investment expertise and Clearwater's efficient, flexible solution are a powerful combination.

### Timely Data Powers Portfolio Decisions

Clearwater's daily automated data aggregation and reconciliation across all holdings allows AAM's portfolio management team to log in each morning and immediately gain access to the updated, validated investment information they need to get to work right away analyzing the data and making portfolio decisions.

**"What I really like about Clearwater is the daily updated data that's always available on the website. You can slice and dice your portfolio anyway you want to."**

**Beth Sanford, Assistant Portfolio Manager at AAM.**

One of the first things Sanford monitors each day in Clearwater is her portfolio's cash position to ensure her clients are getting added value by keeping that cash invested. She also monitors cash projections and maturities or coupon payments coming up to inform her decisions.

The updated, complete portfolio information allows AAM's team to quickly react to market movements, such as Brexit. In that instance, AAM could check their positions, monitor their exposures to British companies and currency, and use that information to quickly make determinations.

Clearwater aggregates investment data across all AAM's holdings, which enables AAM to model hypothetical portfolios and make compelling, data-driven presentations to prospective clients.

**"We're able to create a model portfolio based off their liabilities, their duration target, their benchmark, and we're able to bring all the data together of all the holdings that we have in order to build the best portfolio for a client," Sanford said.**

### Building a Better Client Experience

With Clearwater, AAM's clients have access to a web portal they can use to actively monitor their investments. This gives clients access to the same data their portfolio managers and advisors rely on to make investment decisions. Clients are encouraged to ask questions about their investments, and

**AAM**

**\$27.2**

**Billion In  
Assets Under  
Management**

...

**117**

**Insurance  
Clients**

as of 3/31/2021

...

with access to the same investment data across the board, AAM can more easily respond to those questions. AAM is also able to build reports in Clearwater that their clients can run to analyze their portfolios and get the information they need when they need it.

**“Our end clients with the added value that they get from our service are more likely to retain us, and new clients are more likely to hire us. Our clients are probably happiest with the transparency they receive”**

**Patryk Carwinski, Portfolio Manager at AAM.**

Clearwater’s SaaS model also creates advantages for data accuracy and efficiency.

**“The more people you have looking at data at one time, and the more eyes you have on it, the greater the potential for more accurate data and the most efficient data that you can get,” Sanford said.**

**“We’ve really utilized that aspect of Clearwater quite a bit, and it’s been helpful for our business.”**

## An Appreciating Asset

Clearwater’s SaaS solution is continuously refined and enhanced to stay ahead of changing market demands and regulatory requirements and incorporate emerging technology to solve industry challenges. This is done without disrupting services to users.

**“Since we became a Clearwater client, there’s been a lot of additional functionality that was rolled out that specifically helps the investment management side of the organization,” Carwinski said.**

Clearwater’s capabilities also make it easier for AAM to add new asset classes from both an accounting and portfolio management standpoint to support new business growth and opportunities.

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Clearwater Analytics is a global industry-leading SaaS solution for automated investment data aggregation, reconciliation, accounting, and reporting. Each day, the Clearwater solution reports on more than \$5.6 trillion in assets for clients that include leading insurers, asset managers, corporations, pension plans, governments, and nonprofit organizations – helping them make the most of their investment portfolio data with a world-class product and client-centric servicing. Investment professionals in 50 countries trust Clearwater to deliver timely, validated investment data and in-depth reporting.

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