

INSURANCE ASIA NEWS

Institutional Asset Management Awards
2024



Our alpha tools are designed to consistently seek excess returns from stock selection without adding tracking error or other market risks.



Rob Hinchliffe, CFA
Portfolio Manager and Head of Global Sector Cluster Research
PineBridge Investments

Best Global Equities Manager PineBridge Investments

PineBridge has been named Best Global Equities Manager for the second consecutive year, in recognition of its consistent peer group outperformance driven by the firm's active, high-conviction investment philosophy and differentiated approach to alpha generation.

PineBridge offers an array of global, regional, and country-specific equity strategies. The equity team largely attributes their success to the distinct approach they take in viewing stocks and risks.

Lifecycle is the linchpin

PineBridge focuses on alpha, but at a similar level of risk to the benchmark. Its alpha tools are designed to consistently seek excess returns from stock selection without adding tracking error or other market risks and have been tested across widely varying market conditions.

One of the most important tools is its proprietary Lifecycle Categorization Research (LCR) framework, which is used to evaluate a company based on its maturity and cyclical nature, rather than the standard approach of thinking about companies based on sectors.

This framework allows PineBridge to perform head-to-head analysis of companies even if they are in different industries. A high-stable-growth health care provider, for instance, should be approached in the same manner as a high-stable-growth company in the technology industry. This is because stocks of companies at the same point in their lifecycles will tend to behave similarly in the market.

The team believes the LCR approach provides a more accurate reading of a company's relative potential, which may often be overlooked by investors using the standard forms of categorization.

Insurance is PineBridge's largest client segment and the insurance client count expanded from 64 in 2019 to more than 130 as of 31 March 2024.

With a dedicated Insurance Solutions team, PineBridge works with insurers around the world to address industry challenges and design optimal investment structures to help insurers solve a complex puzzle of objectives and constraints.

PineBridge takes a consultative approach to assessing insurance clients' portfolio needs, with consideration for balance sheet protection, growth strategy, liability projection, liquidity, and regulatory requirements.

The team provides insurance solutions that address asset-liability matching and risk-based capital requirements within a portfolio, and seek to optimize risk-adjusted returns. The firm manages US\$45.4 billion of assets on behalf of these clients as of 31 March 2024.

Investment involve risks. Past performance is not indicative of future performance. Investors should refer to the offering documents for details, including risk factors.