



Marsh Captive Upside: 20/20/20 Webcast Series

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Marsh Captive Upside: 20/20/20 Series Agenda and Speakers

- Year in Review: Growth and Expansion.
- What's Next for Captives?



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The image features a solid blue background with a subtle, abstract pattern of overlapping, slightly irregular shapes in various shades of blue, creating a layered, topographical effect. The text 'Where We Are' is centered in a clean, white, sans-serif font.

Where We Are

2020 Captive Landscape

Captives Offer Value in Uncertain Times

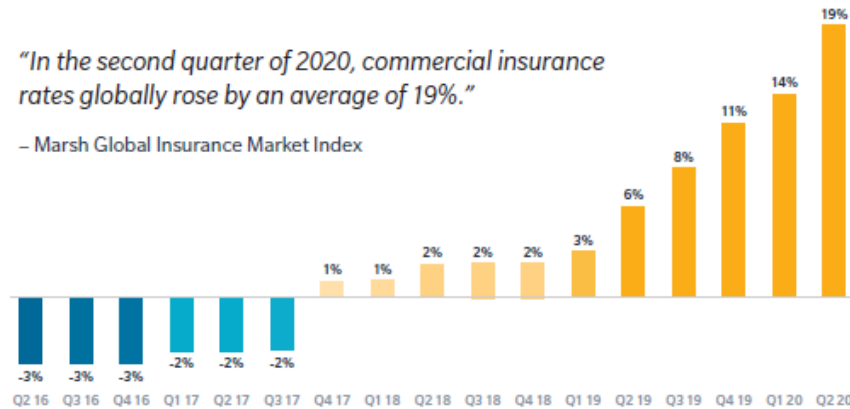
Insurance rates continue to grow.

Global insurance prices, on average, have risen every quarter since the fourth quarter of 2017.

SOURCE: MARSH ANALYTICS SOLUTIONS

"In the second quarter of 2020, commercial insurance rates globally rose by an average of 19%."

– Marsh Global Insurance Market Index



As a result, more organizations are turning to captives.

And existing captive owners are expanding their use.

Premium growth in captives shows continued increase in utilization, while captive premiums in traditional lines have also grown (2018-2019):



Here's what you can expect from captives in 2021:

59% of captive owners plan to **Increase** their use of captives in response to changing market conditions by:

- Adding more lines of coverage.
- Increasing retentions in the captive.
- Forming an additional captive.

Also anticipated:

- Continued growth in single parent captive formations.
- Growth in the use of protected cells to address capacity and pricing difficulties, such as for D&O.

2020 Captive Landscape Pandemic Response With Captive Liquidity

Since March 2020 Marsh has helped owners free more than



from their captives using short-term liquidity tactics to respond to cash-flow challenges.

The Rise of the Protected Cell Company Marsh Cell Captive Facilities Locations



The image features a dark blue central area with the text "What's Next?" in white. This central area is framed by a lighter blue border that has a wavy, organic shape. The overall design is clean and modern, with a focus on the central text.

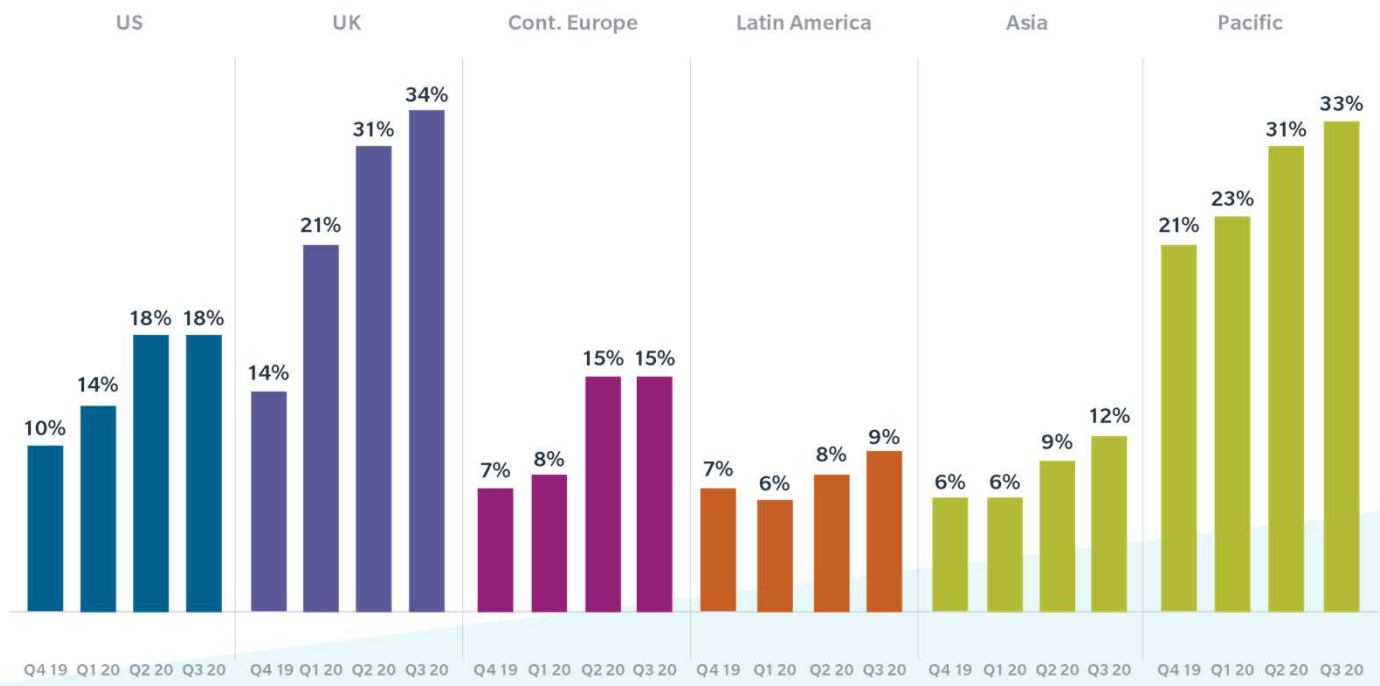
What's Next?

Global Insurance Market Index Quarter 3, 2020

FIGURE
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Composite Insurance Pricing Change — By Region

SOURCE: MARSH



Source:
Marsh

2021 and Beyond



Marsh Captive Upside: 20/20/20 Series Thank You

Questions or feedback about this webcast?

Please reach out to:

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Want to hear our earlier webcasts again? All prior recordings and slide decks are available on our replay page:

<https://coronavirus.marsh.com/us/en/insights/research-and-briefings/captive-upside-webcast-series.html>



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