

# CLIENT FACT SHEET

## CLIENT



## OVERVIEW

Mercury Insurance's investment accounting system did not provide the transparency and consolidation they needed for a full view of their large and complex portfolio. Additionally, the system did not integrate efficiently, so compiling shared reports was time-consuming and cumbersome.

With Clearwater's consolidated and integrated web-based platform, Mercury can view all of their portfolio data and holdings daily from a single access point. Clearwater's daily reconciliation and data aggregation enable Mercury to closely monitor their portfolio performance and compliance at any time. Mercury utilizes Clearwater's customized reporting capabilities to gain both high-level and in-depth portfolio views for more informed and strategic investment decisions.

## CORPORATE PROFILE

### INDUSTRY

- P&C

### PORTFOLIO

- \$3.5 billion +
- 15+ entities with corporate bonds, municipal bonds, options, and more

## REASONS FOR CHOOSING CLEARWATER

- ✓ Daily, customized reporting supporting non-traditional asset classes' complexities
- ✓ Automated web-based platform that reduces manual processes
- ✓ Full integration across all systems for complete portfolio visibility
- ✓ Daily access to risk, compliance, and performance reports

“The first thing that struck me about Clearwater was its reporting capabilities. We can customize reports to our precise needs, even for our portfolio with derivatives and other complex investments. As Clearwater has continued to evolve and add new reporting capabilities, we gain more and more value from it.”

**Stephen Nikander**

*Manager of Treasury & Investments  
Mercury Insurance*



TO LEARN MORE, PLEASE CONTACT US AT  
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Consolidated and Integrated Data for  
In-Depth Portfolio Transparency