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Client name (optional)

Month 00, 20XX

Presenter1, Job Title, location | Presenter2, Job Title,
location

Tagline (optional)

MMC

01



Marsh & McLennan Companies

Four Operating Companies

 Marsh

\$6.9B

34,000+ Colleagues

Insurance broking and risk
management

 GuyCarpenter

\$1.3B

2,400+ Colleagues

Reinsurance and intermediary
advisory services

 Mercer

\$4.7B

23,000+ Colleagues

Talent, health, retirement
and investments

 OliverWyman

\$2.0B

5,000+ Colleagues

Management consulting, economic
analysis and brand consulting

MMC At a glance

34,000+

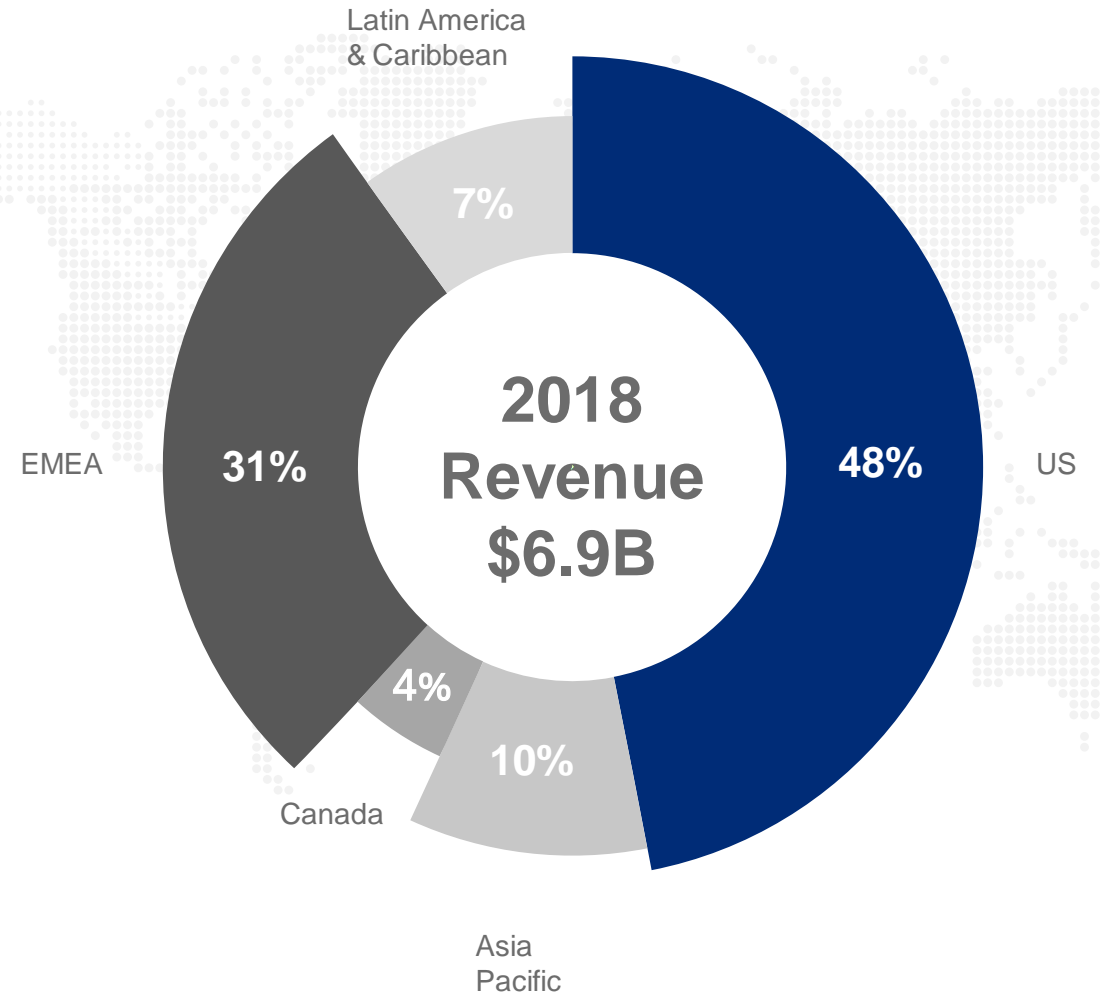
Over 34,000 colleagues serving businesses, public entities and private clients in more than 130 countries

35+

More than 35 risk, specialty and industry practices

500+

Over 500 offices worldwide



Marsh

02



Marsh - Who we are & what we do

Who we are?

Marsh is a global leader in insurance broking and risk management. We help clients quantify and manage risk — and help them unlock new opportunities for growth.



What we do?

We provide industry-focused consulting, brokerage, and claims advocacy services, and leverage data, technology, and analytics to help reduce our clients' total cost of risk



How we work?

- **Simplicity**
Reduce complexity on ourselves and clients
- **Agility**
Pace, flexibility
- **Empowerment**
Distributed decision-making
- **Transparency**
Role clarity and alignment around purpose

Our expertise

by industry (US market)



Aviation & Aerospace

- More than 300 specialists in over 20 offices worldwide



Marine

- Over 100 years of marine expertise
- 600 maritime specialists worldwide
- US\$3 billion in coverage globally



Transportation

- More than US\$550 million in premium for over 430 US clients in 2017
- 12 of the top 25 US logistics firms



Rail

- Global network of more than 70 dedicated rail specialists in risk consulting and insurance brokerage
- Market reach to rail underwriters worldwide

Our expertise

by industry (US market)



Construction

- 2,500+ construction clients
- 350+ active projects with US\$100+ billion in total value
- 1,000 construction experts



Mining

- 40+ years of public sector expertise
- 400+ public entity US clients
- US\$400 million in premium placements



Infrastructure

- More than 600 dedicated professionals worldwide
- Over 25 years of infrastructure experience



Real estate

- Nearly 750 dedicated insurance and risk management professionals
- Serving more than 860 US clients and thousands of clients worldwide
- Placing more than US\$1.4 billion in premiums into the US marketplace and billions worldwide

Our expertise

by industry (US market)



Communications, media & technology

- 2000+ CMT clients globally
- 450+ US errors and omissions/cyber risk policies a year
- 100 US diagnostics in last three years



Education

- More than 45 years of experience in the US education sector
- US\$100+ million in gross premium across the industry



Hospitality and gaming

- Nearly 750 dedicated insurance and risk management professionals
- serving more than 150 US clients
- placing more than US\$380 million in premium in the US marketplace and nearly US\$450 million worldwide



Financial institutions

- 1,000+ professionals
- US\$4 billion in global premium
- 75% of Fortune 50 and 41% of Fortune 1000 are clients

Our expertise

by industry (US market)



Life sciences

- Serving 34 of top 50 pharma firms
- seven of top 10 generics
- 35 of top 50 medical device makers
- 19 of top 50 bio-techs



Health care

- 2,500+ construction clients
- 350+ active projects with US\$100+ billion in total value
- 1,000 construction experts



Chemical

- 100+ colleagues globally
- 1,000+ clients
- 500+ North American clients
- 72 of the top 100 US chemical companies

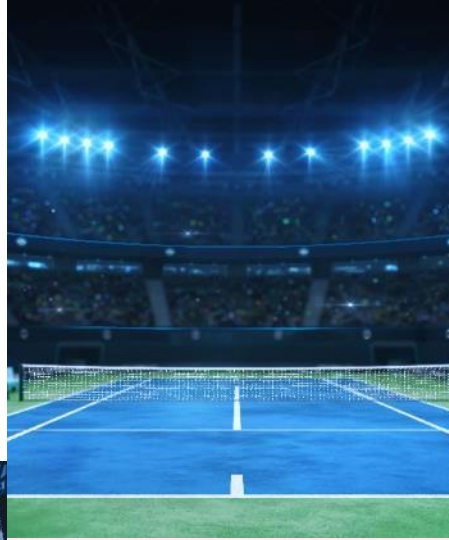


Retail, wholesale, & food & beverage

- Risk advisor to over half of the top 50 retailers including 9 of the top 10 as ranked by the National Retail Federation

Our expertise

by industry (US market)



Sports, events & entertainment

- Nearly 200 dedicated hospitality, sports & entertainment insurance and risk management professionals
- serving over 400 US clients
- placing more than US\$575 million in premium in the US marketplace and millions globally.



Environmental

- More than 60 full-time environmental insurance professionals globally
- More than US\$6 billion in US limits in 2014



Manufacturing and automotive

- 500+ dedicated manufacturing and automotive insurance and risk management professionals
- in more than 130 countries worldwide
- serving nearly 1,000 US clients
- placing more than US\$1.7 billion in premium in the US marketplace



Public entity

- More than 45 years of experience in the US education sector
- US\$100+ million in gross premium across the industry



Energy and power

- More than 700 energy and power specialists around the world

Marsh Priorities



Colleagues

- Intelligently manage the JLT Integration
- Capitalize on Synergies to create a Rewarding Environment for Colleagues
- Aligning colleague integration, expertise and investment strategies around an improved client experience



Client

- Enhancing Digital Experience for Clients
- Providing Clients with outstanding colleagues, advice and products
- Improving Client's Claim Experience
- Increasing Industry & Specialty Focus



Growth

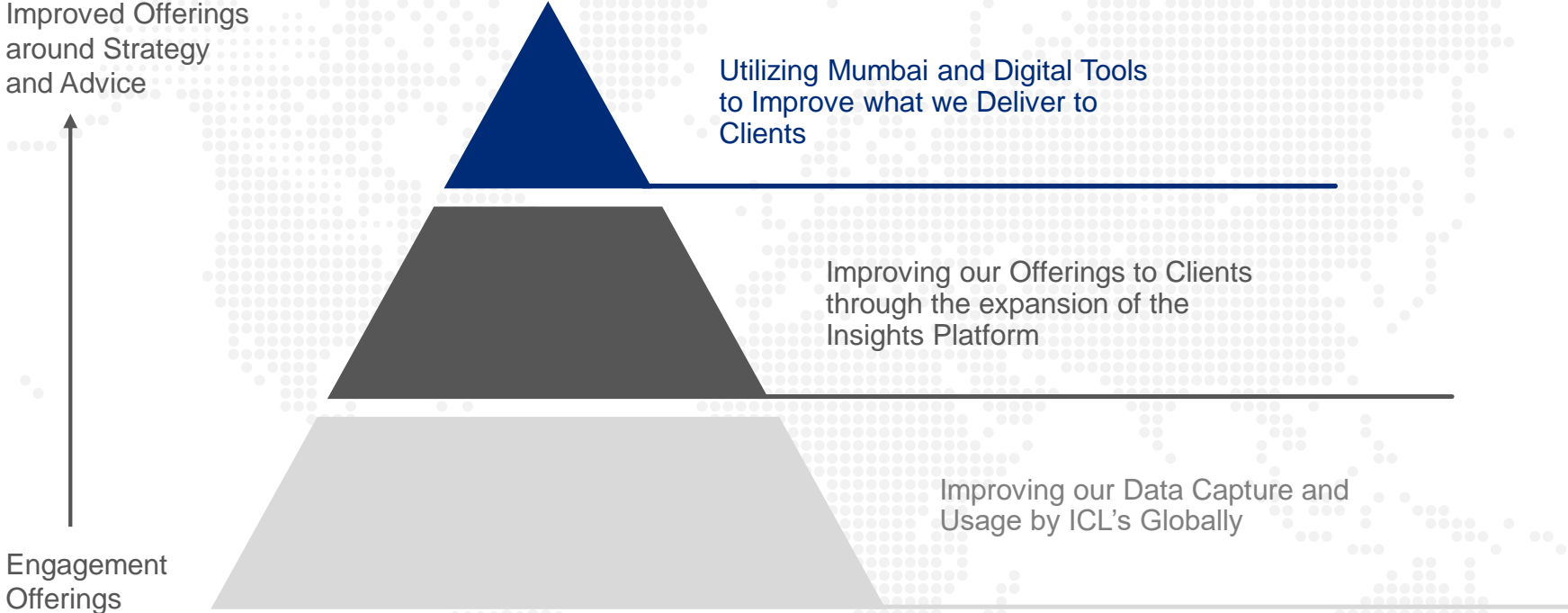
- Affinity/Shared Economy
- Cyber
- MMA
- Construction
- Reps and Warranties
- Grow SME business via digital MGA / Dovetail

ICG

03



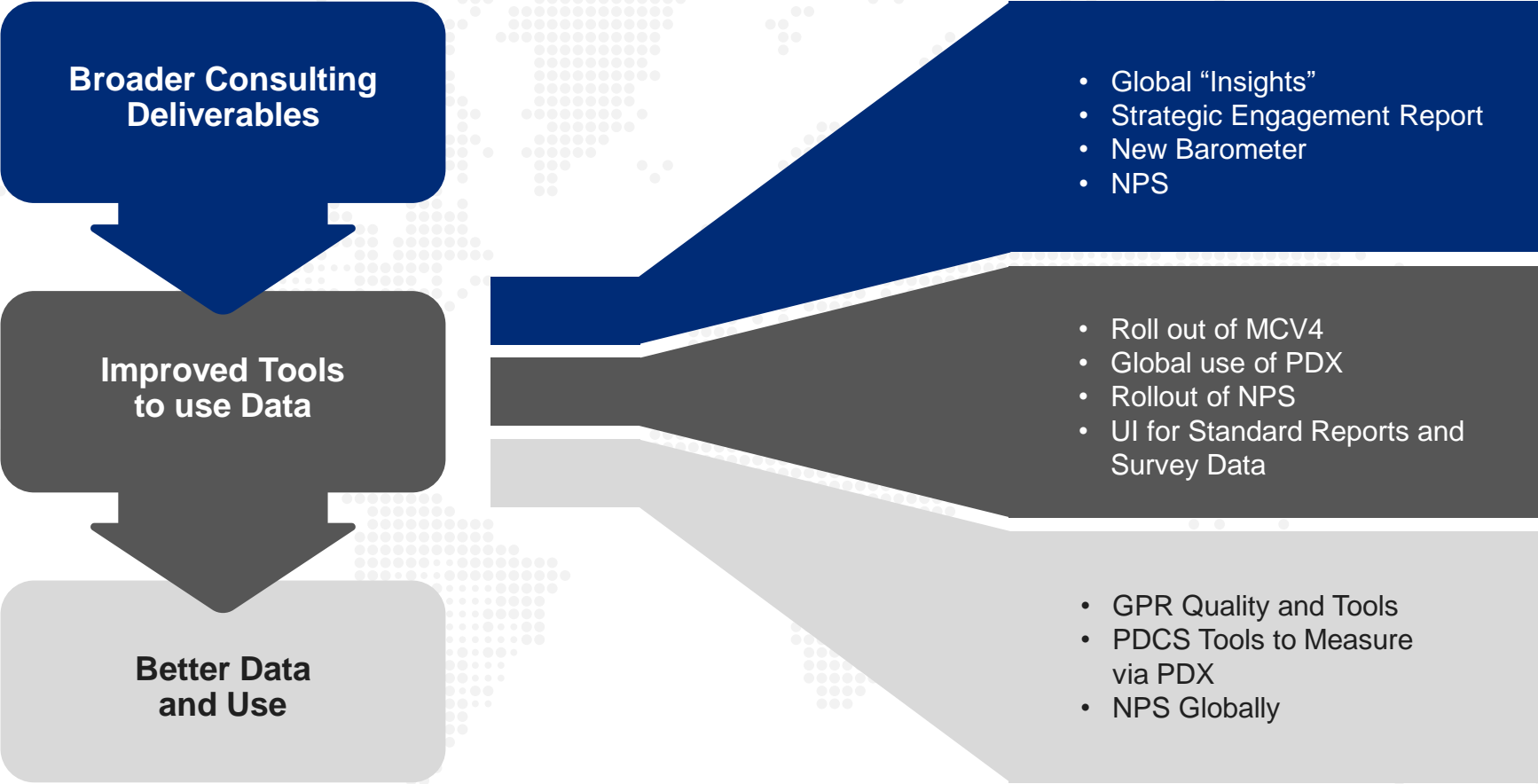
ICG must continue to focus on Improving its Value to Clients in 2020 - “The Journey from Concierge to Consultant”



ICG 2020 Strategy



ICG must continue to focus on Improving its Value to Clients in 2020 - “The Journey from Concierge to Consultant”



Regional SWOT Analysis

Europe



Strengths

- Country-level relationships remain strong at all levels
- Strong trading and focus on strategic priorities have brought solid results



Weaknesses

- AXA XL Property is a key player for the German market, however, risk appetite has shifted with a clear capacity reduction. Some regions also report remediation action for manufacturing and automobile industry.
- Slow response in France in Financial Lines and Construction due to limited resource



Opportunities

- In light of the in Nordics Following JLT acquisition and associated expanded opportunities in Nordics, leadership meeting to take place to discuss growth strategies
- Opportunities are expected to arise from deepening mid-market penetration, cross-selling on existing portfolio, and AXA XL drive to lead on global programs



Threats

- AXA XL made it clear that rate adequacy (not top line) growth is the key and that this may lead to difficult renewals
- Integration progresses in 2019; AXA XL should maintain strong and regular communication with Marsh to avoid any disconnect. No surprises!



Marsh is one of the Marsh & McLennan Companies, together with Guy Carpenter, Mercer, and Oliver Wyman.

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