

# Phoenix Companies Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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## Abstracts

Phoenix Companies Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Phoenix Companies Inc. and its competitors. This provides our Clients with a clear understanding of Phoenix Companies Inc. position in the Industry.

The report contains detailed information about Phoenix Companies Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Phoenix Companies Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Phoenix Companies Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and

company's long-term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes Phoenix Companies Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Phoenix Companies Inc. business.

### **About Phoenix Companies Inc.**

The Phoenix Companies, Inc. provides life insurance and annuity products through third-party distributors, supported by wholesalers and financial planning specialists.

The company's life insurance product line is focused on permanent life insurance (whole life, universal life and variable universal life) insuring one or more lives. Its annuity products include deferred and immediate, fixed and variable annuities with various death benefit and guaranteed living benefit options.

The company's principal operating subsidiaries are Phoenix Life Insurance Company and PHL Variable Insurance Company.

### **Products**

#### **Life Products**

The company's life insurance products include universal life, variable universal life, term life and other insurance products. It offers single life, first-to-die and second-to-die products. Under first-to-die policies, up to five lives might be insured with the policy proceeds paid after the death of the first of the five insured lives. Second-to-die

products are used for estate planning purposes and insure two lives, with the policy proceeds paid after the death of both insured individuals.

**Universal Life:** Universal life products provide insurance coverage and might allow the policyholder to increase or decrease the amount of death benefit coverage over the term of the policy. The company also offers an indexed universal life product that provides death benefit protection and the opportunity to invest policy value in any combination of three different accounts.

**Variable Universal Life:** Variable universal life products provide insurance coverage and might allow the policyholder to increase or decrease the amount of death benefit coverage over the term of the policy.

### Annuity Products

The company offers a range of annuity products, including fixed, variable, and other types of annuities in both deferred and immediate varieties. Deferred annuities accumulate for a number of years before periodic payments begin and enable the contract owner to save for retirement and provide options that protect against outliving assets during retirement.

**Fixed Annuities:** Fixed annuities provide a guaranteed rate of return over a specified period of time. The company offers deferred fixed indexed annuities, a deferred fixed annuity and an immediate fixed annuity.

The company's single-premium deferred modified guaranteed fixed annuity meets the needs of clients who want a guaranteed rate of return over a specified period. The fixed annuity offers various interest rate guarantee periods. Its single premium immediate fixed annuity provides a guaranteed income stream for a specified period of time and/or over the lifetime of the annuitant.

**Variable Annuities:** Deferred variable annuities allow contract owners to direct deposits into various separate investment accounts (accounts that are maintained separately from the other assets of the Life Companies) or into the general accounts of the Life Companies. The company collects fees for the management of these various investment accounts and assesses charges against these accounts for the administrative services it provides.

The company's variable annuities include a guaranteed minimum death benefit

(GMDB). Variable annuity contract owners may also elect certain living benefit guarantees, including guaranteed minimum income benefits (GMIBs), guaranteed minimum withdrawal benefits (GMWBs) and guaranteed minimum accumulation benefits (GMABs).

**Other Annuities:** The company also offers a single-premium deferred equity indexed annuity and a single premium immediate fixed and variable annuity.

### Other Products and Services

Through Goodwin Capital Advisers, Inc. (Goodwin), the company manages fixed income investments for third parties, including mutual funds, pension plans and endowments. It subadvise certain mutual funds for its former affiliate, Virtus Investment Partners, Inc. (Virtus).

### Distribution and Support Services

The service and support the company provides include customized advice on estate planning, charitable giving planning and retirement planning, provided by a staff of professionals with specialized expertise in the application of life insurance; market research and education programs designed to help advisors understand, which financial products the affluent and market demands; and nationwide teams of life and annuity product specialists who provide education and sales support to distributors and who can act as part of the advisory team for case design and technical support. The company assists advisors in marketing to specific customer segments, such as senior corporate executives, business owners and households.

### Significant Events

On October 5, 2010, Phoenix Companies Inc. announced a strategic alliance with The AltiSure Group. This collaboration would allow the two organizations to combine their expertise in developing annuity and life insurance products and bring these solutions to various consumers.

### History

The Phoenix Companies, Inc. was founded in 1851.

The above Company Fundamental Report is a half-ready report and contents are

subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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## ANALYSIS FEATURES

### SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

### Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

### PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

## Key Factors Examined by PESTEL Analysis:

**Political** – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

**Economic** – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

**Sociological** – What cultural and societal aspects will work upon the demand for the business's products and operations?

**Technological** – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

**Environmental** – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

**Legal** – What laws and legislation will exert influence on the style the business is carried out?

## **IFE, EFE, IE Matrices**

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

## **Porter Five Forces Analysis**

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

## **VRIO Analysis**

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

## Reputation

### Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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