

SEPTEMBER 2020

Annuity Intelligence Report


Several insurers decreased fixed annuity rates on September 1. Even still, products are available in all states except New York that yield at least 3.0% APY for 5-year terms. Top immediate and longevity annuity rates have held steady over the last month.




Current Immediate & Longevity Annuity Rates

A **\$100,000** purchase will create annual income of:

		INCOME STARTS								
		Age	Now	5 yrs	10 yrs	15 yrs	20 yrs	25 yrs	30 yrs	35 yrs
MALE	50		\$4,330	\$5,230	\$6,770	\$9,110	\$12,940	\$19,600	\$31,800	\$56,720
	55		\$4,710	\$5,810	\$7,760	\$10,920	\$16,480	\$27,130	\$49,280	
	60		\$5,230	\$6,760	\$9,440	\$14,110	\$23,180	\$42,940		
	65		\$5,930	\$8,080	\$12,140	\$19,570	\$36,200			
	70		\$6,890	\$10,280	\$17,500	\$30,050				
	75		\$8,270	\$14,140	\$29,490					
FEMALE	50		\$4,170	\$5,150	\$6,620	\$8,760	\$12,160	\$17,940	\$28,360	\$49,680
	55		\$4,500	\$5,660	\$7,490	\$10,280	\$15,090	\$24,140	\$42,900	
	60		\$4,930	\$6,260	\$8,570	\$12,430	\$19,780	\$35,710		
	65		\$5,560	\$7,360	\$10,630	\$16,720	\$30,050			
	70		\$6,430	\$8,950	\$14,250	\$24,310				
	75		\$7,650	\$11,840	\$22,110					



Immediate



Longevity

Immediate and longevity annuity quotes shown as annual income for a \$100,000 premium as of 9/1/2020. All quotes are life only.

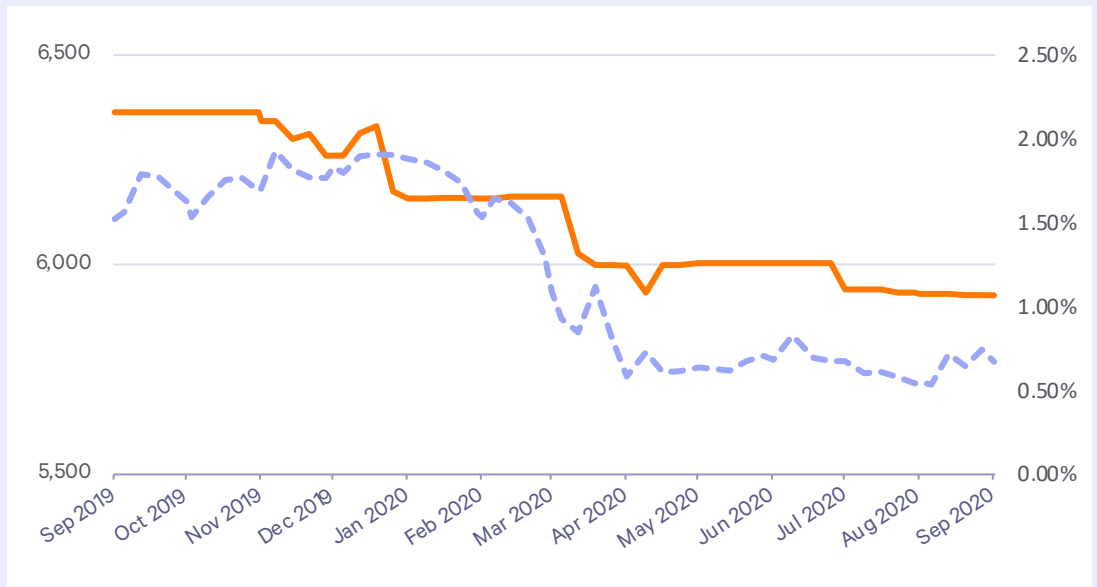


Immediate Annuity Rate History Compared to 10 year Treasury

Top annuity rates for a 65 year old male with income starting immediately

10 year Treasury

Weekly historical top life only immediate annuity quotes shown as annual income for a \$100,000 premium.

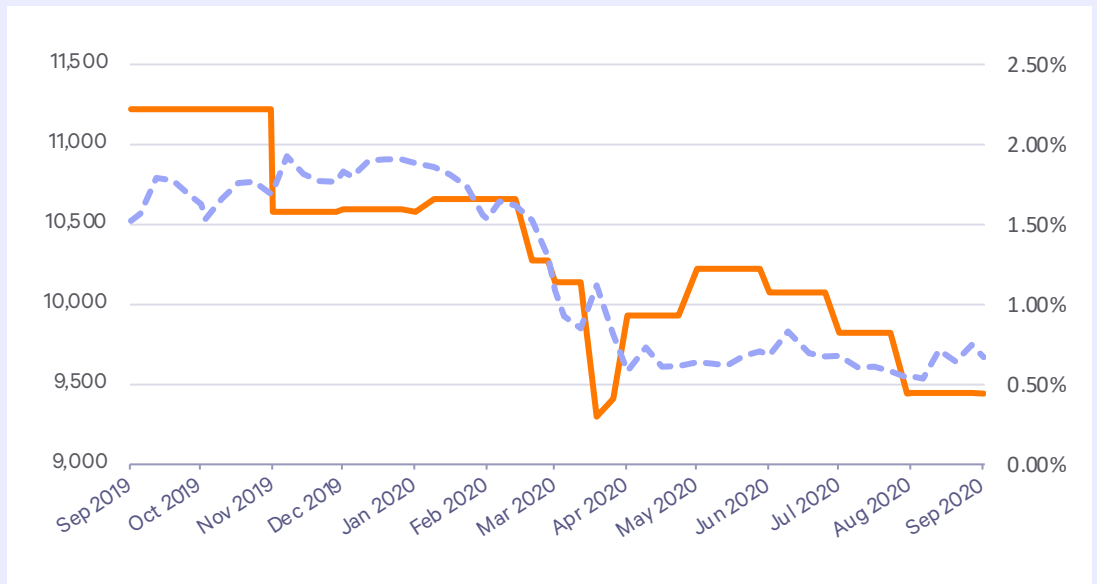


Longevity Annuity Rate History Compared to 10 year Treasury

Top annuity rates for a 60 year old male with income starting in 10 years

10 year Treasury

Weekly historical top life only longevity annuity quotes shown as annual income for a \$100,000 premium.



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Current Fixed Annuity Rates

A **\$100,000** investment will earn annually:

Rating	INVESTMENT TERM							
	3 year	4 year	5 year	6 year	7 year	8 year	9 year	10 year
A++	1.40%	1.40%	1.40%	1.35%	1.35%	-	-	-
A+	2.10%	1.40%	2.40%	1.70%	2.85%	-	1.45%	2.60%
A	2.10%	1.75%	3.20%	2.25%	2.85%	2.30%	2.35%	2.60%
A-	2.40%	2.80%	3.20%	2.90%	3.05%	2.95%	2.90%	3.05%
B++	2.50%	2.80%	3.45%	3.42%	3.50%	2.95%	3.05%	3.60%
B+	2.60%	2.80%	3.45%	3.42%	3.50%	2.95%	3.05%	3.60%

Top fixed annuity yields to maturity shown for \$100,000 investments from insurers with minimum credit rating according to A.M. Best. Rates as 9/2/2020.



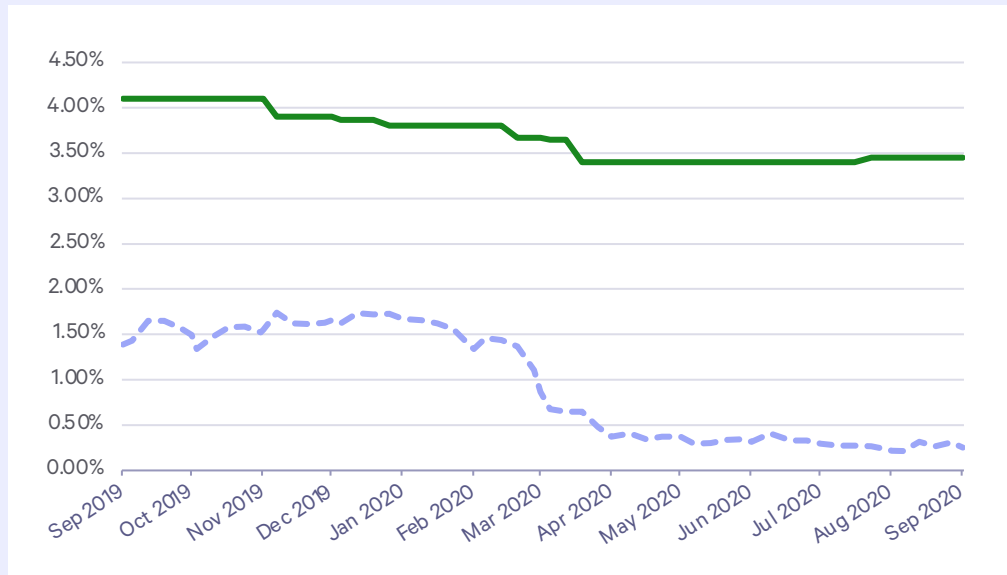
5 year Fixed Annuity Rate History

Compared to **5 year Treasury**

Top 5 year fixed annuity rate

5 year Treasury

Weekly historical top 5 year fixed annuity rates for a \$100,000 premium.



Difference of **3.20%**

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