

JULY 2020

Annuity Intelligence Report

Top fixed annuity rates have held steady or risen slightly since June, while the top income annuity payouts are down slightly. Today's heightened levels of economic uncertainty makes it even harder to predict where rates will move, as we've been seeing a mix of increases and decreases this 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	\$4,490	\$5,400	\$6,970	\$9,240	\$12,940	\$19,600	\$31,800	\$56,720
	55	\$4,830	\$6,000	\$8,000	\$10,980	\$16,480	\$27,130	\$49,280	
	60	\$5,270	\$6,970	\$9,820	\$14,110	\$23,180	\$42,940		
	65	\$5,940	\$8,410	\$12,820	\$19,570	\$36,490			
	70	\$6,890	\$10,700	\$18,420	\$31,870				
	75	\$8,390	\$14,660	\$30,950					
FEMALE	50	\$4,360	\$5,150	\$6,620	\$8,760	\$12,160	\$17,940	\$28,360	\$49,680
	55	\$4,680	\$5,660	\$7,490	\$10,280	\$15,090	\$24,140	\$42,900	
	60	\$5,080	\$6,370	\$8,730	\$12,430	\$19,780	\$35,710		
	65	\$5,680	\$7,550	\$11,010	\$16,720	\$30,050			
	70	\$6,440	\$9,340	\$15,020	\$25,510				
	75	\$7,740	\$12,310	\$23,240					
		Immediate				Longevity			

Immediate and longevity annuity quotes shown as annual income for a \$100,000 premium as of 7/1/2020. All quotes are life only.



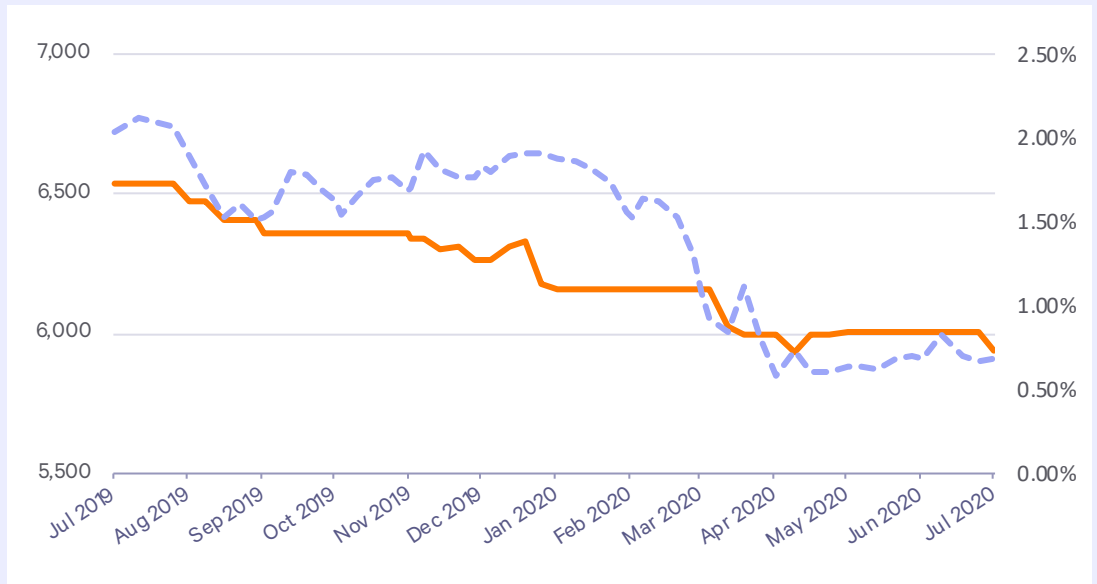
Immediate Annuity Rate History

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.



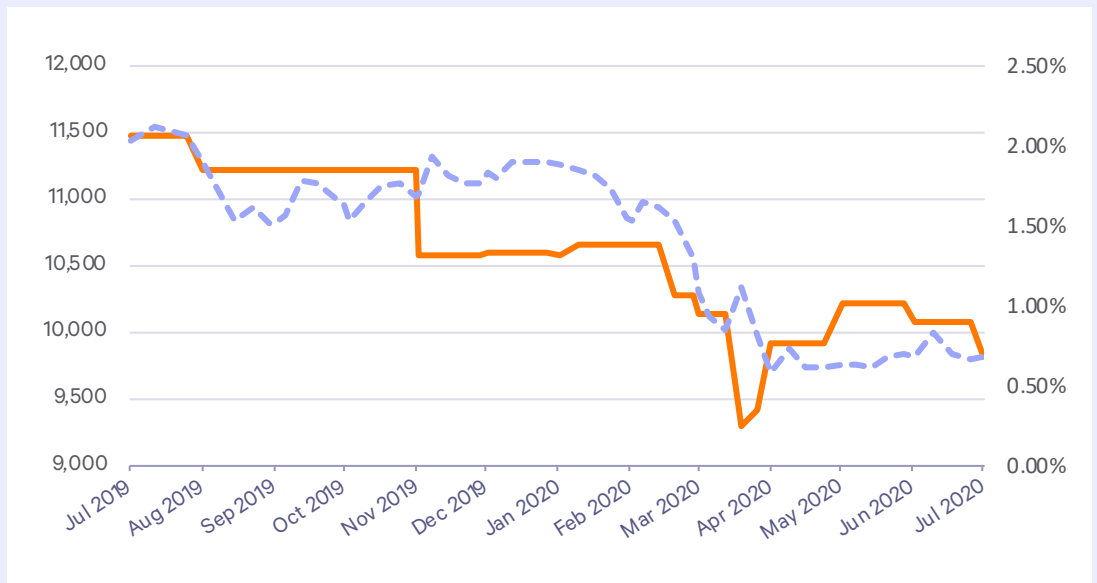
Longevity Annuity Rate History

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.



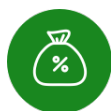
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Current Fixed Annuity Rates

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

INVESTMENT TERM								
Rating	3 year	4 year	5 year	6 year	7 year	8 year	9 year	10 year
A++	1.65%	1.65%	1.65%	1.60%	1.60%	-	-	-
A+	2.40%	1.65%	2.75%	1.75%	3.25%	-	1.60%	2.60%
A	2.40%	2.10%	2.80%	2.85%	3.25%	2.70%	2.77%	2.80%
A-	3.00%	3.05%	3.20%	3.10%	3.25%	3.10%	3.00%	3.25%
B++	3.00%	3.05%	3.35%	3.42%	3.45%	3.10%	3.05%	3.55%
B+	3.00%	3.05%	3.35%	3.42%	3.45%	3.10%	3.05%	3.55%

Top fixed annuity yields to maturity shown for \$100,000 investments from insurers with minimum credit rating according to A.M. Best. Rates as 7/1/2020.



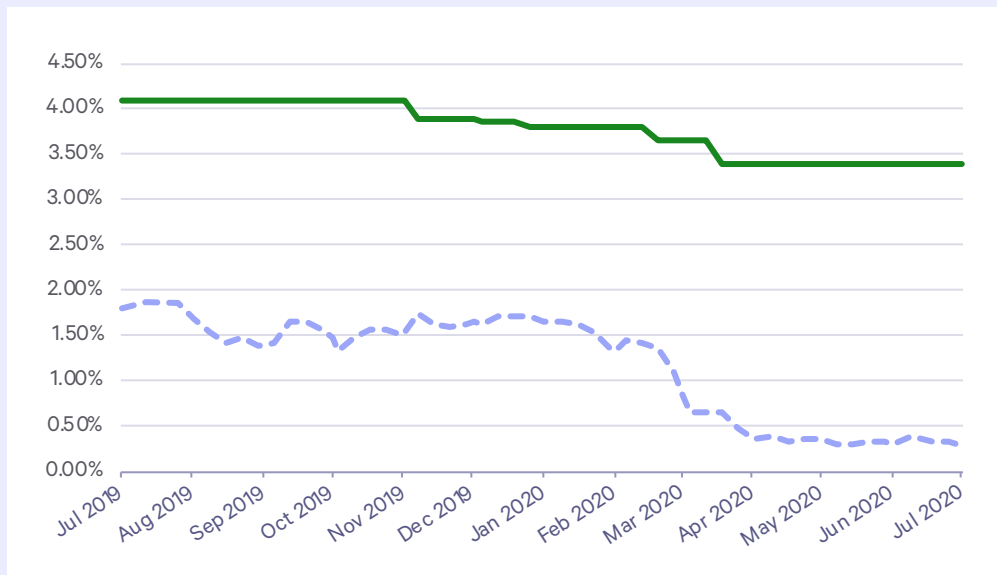
5 year Fixed Annuity Rate History

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 **3.11%**

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Today's
Rates

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