

## Case Study

# Investment Publishing Support to a Sell Side Investment Advisory Firm



## About the Client

- Our client is a reputed Wall Street Sell Side investment advisory firm

## Business Objective

- The client sourced our help for continual support towards writing Primer Calls on various managed care related issues. The client required:
  - Research on the Limited Benefit Market, otherwise called Mini Med plans, popular among daily wage and low wage workers
  - Analysis of the future of Limited Benefit Plans, given that the Health Reform strives to eliminate such low premium/ low benefit plans from the market

## Results & Value Add

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The study helped the client in:

- Understanding the current landscape for Limited Benefits Market
- Assessing investment advise for companies with a high exposure to Limited Benefits Plans
- Understand the exact implications of Health Reform law on such plans and the market they serve

# Research Methodology and Approach

- Considering the nature of the client's request, RocSearch conducted a detailed search to understand the market structure, and covered the following:
  - Current market outlook: RocSearch analysed the current market scenario and the prevalence of such mini med plans, and the demographics they are most popular in
  - At a granular level, we also researched the companies that are present in this space, and detailed the market size and the uptake levels
  - Exposure of the coverage companies: We provided the client with the number of lives that the leading companies within their coverage, cover under Limited Benefit plans. This identified the dollar value exposure for the profit margin of these companies through Limited Benefit offerings
  - Post health reform outlook: The health reform seeks to abolish plans, which do not have a benchmark actuarial value and do not cover the basic health services. RocSearch studied the implications of the same on the future enrolment numbers in Limited benefits, and where its headed
  - Implications for coverage companies: RocSearch analysed the impact on profit margins of the companies the client tracks



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## Contact Us

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