



2026 SPRING NATIONAL MEETING  
SAN DIEGO, CA



*2026 Spring National Meeting  
San Diego, California*

**INVESTMENT DESIGNATION ANALYSIS (E) WORKING GROUP**

Tuesday, March 24, 2026  
11:30 a.m. – 1:00 p.m.

**Meeting Summary Report**

The Investment Designation Analysis (E) Working Group met March 24, 2026. During this meeting, the Task Force:

1. Adopted the 2025 Fall National Meeting minutes of the Valuation of Securities (E) Task Force.
2. Exposed a proposed amendment to the *Purposes and Procedures Manual of the NAIC Investment Analysis Office* (P&P Manual) to update the list of credit rating providers for a 30-day public comment period ending April 24.
3. Approved a referral to the Blanks (E) Working Group, Capital Adequacy (E) Task Force, and Statutory Accounting Principles (E) Working Group regarding a proposed annual statement schedule update for security identifiers.
4. Exposed a proposed amendment to the P&P Manual regarding analysis of parent-subsidary situations for a 30-day public comment period ending April 24.
5. Received an annual report from the Securities Valuation Office (SVO) on 2024 carry-over filings.