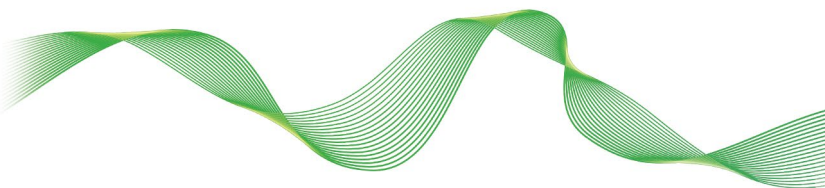




2026 SUMMER NATIONAL MEETING COLUMBUS, OH



*2026 Summer National Meeting
Columbus, Ohio*

INVESTMENT DESIGNATION ANALYSIS (E) WORKING GROUP

Thursday, August 13, 2026

9:00 – 10:00 a.m.

Meeting Summary Report

The Investment Designation Analysis (E) Working Group met Aug. 13, 2026. During this meeting, the Working Group:

1. Adopted its Spring National Meeting minutes (*see NAIC Proceedings – Spring 2026, Investment Designation Analysis (E) Working Group, Attachment One*).
2. Adopted its 2027 proposed charges.
3. Adopted a proposed Purposes and Procedures Manual of the NAIC Investment Analysis Office (P&P Manual) amendment to update the list of NAIC Credit Rating Providers (CRPs). The Working Group had previously exposed the amendment for a 30-day public comment period ending April 24, 2026.
4. Adopted a proposed amendment to the P&P Manual for analysis of parent-subsidary situations. The Working Group had previously exposed the amendment for a 30-day public comment period ending April 24, 2026.
5. Exposed a proposed amendment to the P&P Manual to update the Filing Exempt (FE) treatment of collateralized loan obligations (CLOs) for a 30-day public comment period ending Sept. 14, 2026.
6. Directed NAIC committee support to refer to the Credit Rating Provider (E) Working Group a rating agency request to become a CRP.
7. Heard a presentation from NAIC committee support on a request to be added to the NAIC's List of Nationally Recognized Statistical Rating Organizations (NRSROs) to Be Used to Administer the NAIC's List of Qualified U.S. Financial Institutions.
8. Heard a report from the Chair that the NAIC's ability to implement discretion over NAIC Designations assigned through the Filing Exemption Process is operational.
9. Moved to permit the SVO to temporarily extend the private rating filing deadlines for a period equivalent to the outage period that began on Jun. 17, 2026.