

## Annex A

The table below provides the Product Sales Data (PSD) for Retail Investment sales and premium amounts for each quarter between 1 January 2015 to 31 March 2020.

Year	Quarter	Number of Sales	Total Premium Amount
2015	Q1	379,816	£7,131,081,889
	Q2	484,067	£9,379,315,827
	Q3	476,986	£9,250,115,158
	Q4	517,697	£9,141,185,325
2016	Q1	534,279	£10,819,474,667
	Q2	537,103	£11,854,624,435
	Q3	509,090	£11,075,230,842
	Q4	559,442	£12,316,408,925
2017	Q1	581,060	£14,548,339,979
	Q2	604,371	£16,861,512,041
	Q3	596,059	£17,199,485,159
	Q4	592,665	£18,916,150,773
2018	Q1	534,196	£16,544,883,365
	Q2	510,619	£14,822,151,723
	Q3	525,170	£14,777,439,241
	Q4	533,851	£16,991,948,516
2019	Q1	463,897	£12,641,300,472
	Q2	516,177	£17,237,257,247
	Q3	491,580	£13,680,850,574
	Q4	502,615	£11,886,239,928
2020	Q1	493,354	£11,681,899,872

The table below provides the PSD for Pure Protection Contract sales and premium amounts for each quarter between 1 January 2015 to 31 March 2020.

Year	Quarter	Number of Sales	Total Premium Amount
2015	Q1	193,571	£61,095,519
	Q2	200,211	£84,101,283
	Q3	200,591	£100,401,038
	Q4	187,204	£120,140,991
2016	Q1	204,763	£65,122,061
	Q2	207,190	£72,312,386
	Q3	203,608	£69,177,765
	Q4	217,433	£70,125,056
2017	Q1	197,669	£62,745,381
	Q2	204,412	£64,250,225
	Q3	221,896	£65,385,412
	Q4	218,451	£64,440,819
2018	Q1	220,825	£64,590,335
	Q2	209,811	£64,430,460
	Q3	172,210	£64,228,072
	Q4	179,743	£68,279,409
2019	Q1	182,099	£67,753,599
	Q2	178,029	£69,225,709
	Q3	183,985	£69,477,800
	Q4	185,218	£70,030,704
2020	Q1	203,170	£73,616,525

When reviewing the information, please note the following:

- This data is based on the retail investment and pure protection contracts Product Sales Data (PSD) and does not include all data on transactions made through nominee accounts (such as those used in platforms).
- The extracted data may differ to the published data due to firm resubmissions.
- PSD only captures new sales: transfers, top-ups, alterations, increments and renewals are generally not included.
- Figures based on the type of firm (e.g. Life Insurer), are based on the portfolio to which we allocate firms. However, a firm of one type may conduct a high proportion of other types of business that are not reflected in its portfolio.
- Figures based on the type of firm may not be comparable between previously published PSD when firms switch between primary categories or portfolios.
- Please also note the reported values in the above data refer to the total premium amount. The total premium amount is made up of single and regular premiums. The regular premiums are annualised by multiplying the monthly premiums by 12. The annualised premium amount is indicative of the actual initial investment made by the customer; however, it does not reflect the exact premium amount invested.