FOR AGENTS ONLY

Contact your Group Administrator to gain access to additional agent codes.

Account Production Report

Your monthly production data will be available the third Saturday of each month. Agent codes are updated daily.

Note: Due to recent financial reporting changes, some columns may be blank and 2021 data may be underreported.

THE INSURANCE SHOP

Month End Data

Report View

Summary

Agent Code

0140P THE INSURANCE SHOP

Current Book

YTD Written Premiums: **$1,004,881**

						YTD Change vs. Prior Year To Date			
		Written Premium	Earned Premium	PIF	Loss Ratio	Written Premium ($)	Written Premium (%)	PIF (#)	PIF (%)
Personal Lines Auto	**69%**	$697,509	$653,026	410	41%	**$95,546**	**16%**	**9**	**2%**
Property	**20%**	$205,209	$196,894	180	54%	**$9,093**	**5%**	**-15**	**-8%**
Special Lines	**8%**	$81,194	$71,852	324	20%	**$4,784**	**6%**	**14**	**5%**
Umbrella	**0%**	$2,632	$2,128	9	0%	**($2,142)**	**-45%**	**-4**	**-31%**
Total Personal Lines		$986,544	$923,900	923	42%	**$107,281**	**12%**	**4**	**0%**
Bundled (Auto & Home/Condo/Renters)				107				**-6**	**-5%**

		Written Premium	Earned Premium	PIF	Loss Ratio	YTD Change vs. Prior Year To Date: Written Premium ($)	Written Premium (%)	PIF (#)	PIF (%)
Commercial Lines	2%	$18,337	$14,533	8	2%	$10,556	136%	1	14%

Book - Trend

Written Premium (WP)
Business Line Mix
Trailing 12

	21Q4	22Q1	22Q2	22Q3	22Q4	23Q1	23Q2	23Q3	23Q4	24Q1	24Q2	24Q3
Personal Lines Auto		60%	68%	71%	70%	69%	69%	69%	69%	70%	69%	70%
Property		34%	25%	21%	21%	22%	22%	22%	22%	21%	21%	21%
Special Lines		5%	7%	8%	8%	8%	8%	8%	8%	8%	7%	7%
Umbrella		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Commercial Lines		0%	0%	1%	1%	1%	1%	1%	1%	1%	2%	2%

Policies In Force (PIF)
Quarterly Change

	21Q4	22Q1	22Q2	22Q3	22Q4	23Q1	23Q2	23Q3	23Q4	24Q1	24Q2	24Q3
Total			-34	-41	169	1	2	11	-1	-20	16	-4
Personal Lines Auto			-36	-45	-18	-7	-2	3	0	-5	8	1
Property			0	-1	193	-2	-7	-6	-2	-11	4	-3
Special Lines			1	5	-7	7	11	13	1	0	2	-1
Umbrella			1	-2	0	2	-1	1	0	-4	1	-1
Commercial Lines			0	2	1	1	1	0	0	0	1	0

PIF Count by Quarter

	21Q4	22Q1	22Q2	22Q3	22Q4	23Q1	23Q2	23Q3	23Q4	24Q1	24Q2	24Q3
Total		832	798	757	926	927	929	940	939	919	935	931

	21Q4	22Q1	22Q2	22Q3	22Q4	23Q1	23Q2	23Q3	23Q4	24Q1	24Q2	24Q3
Personal Lines Auto		511	475	430	412	405	403	406	406	401	409	410
Property		15	15	14	207	205	198	192	190	179	183	180
Special Lines		292	293	298	291	298	309	322	323	323	325	324
Umbrella		12	13	11	11	13	12	13	13	9	10	9
Commercial Lines		2	2	4	5	6	7	7	7	7	8	8

Total Written Premium
Trailing 12

2021	2022	2023	24Q3
	$1,414,467	$1,542,014	$1,659,851

Loss Ratio
Trailing 12

	2021	2022	2023	24Q3
Personal Lines Auto		51%	44%	38%
Property		127%	93%	42%
Special Lines		9%	26%	14%
Commercial Lines		0%	28%	20%

New Business

	Current Month			July 2024 vs July 2023			YTD			YTD vs. Prior YTD		
	Quotes	Apps	Conversion	Quotes (%)	Apps (%)	Conversion (%)	Quotes	Apps	Conversion	Quotes (%)	Apps (%)	Conversion (%)
Personal Lines Auto	182	9	5%	65%	29%	-1%	1,230	72	6%	27%	36%	0%
Property	206	2	1%	78%	-33%	-2%	1,338	22	2%	76%	-8%	-2%
Special Lines	7	4	57%	-42%	33%	32%	97	48	49%	4%	4%	0%
Umbrella	47	0	0%	52%		0%	330	2	1%	72%	-33%	-1%
Total Personal Lines	442	15	3%	64%	15%	-1%	2,995	144	5%	49%	14%	-1%
Bundled	184	4	2%	79%	33%	-1%	1,168	22	2%	58%	10%	-1%

	Current Month			July 2024 vs July 2023			YTD			YTD vs. Prior YTD		
	Quotes	Apps	Conversion	Quotes (%)	Apps (%)	Conversion (%)	Quotes	Apps	Conversion	Quotes (%)	Apps (%)	Conversion (%)
Commercial Lines	0	0		-100%			9	1	11%	29%	-67%	-32%

Property Quality

Home Inspection
3 Month Lag

	Current Month	Prior Month	T6	T12
Cancel Rate	100%	25%	38%	29%
Inspections	1	4	8	17

Definition: The percentage of policies that were identified for cancellation or nonrenewal after an inspection was performed.

Home/Condo Bundle

	Current Month	Prior Month	T6	T12
App Bundle Rate		0%	70%	67%
HO/CO Apps	0	1	10	15

For "App Bundle Rate", Bundle is defined as Auto + Home/Condo, this differs from the Bundle metric defined above.

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