



PRESS RELEASE: FOR IMMEDIATE RELEASE

Focus on fundamentals remains key as bulk annuity market evolves, says Cartwright

UK – [07 May 2026] – Cartwright Pension Trusts, the pension specialist for defined benefit and hybrid schemes, today said trustees must keep focus on fundamentals as the UK bulk annuity market continues to evolve.

Commenting, Yona Chesner Head of Pensions Investment at Cartwright Pension Trusts said: “The recent acquisition of Just Group by Brookfield Wealth Solutions is a good example of the continued flow of international capital into the UK retirement market, with well-established insurers increasingly sitting within larger global balance sheets and investment platforms. This reflects a broader trend across the bulk annuity market, which continues to evolve with strong demand, competitive pricing and robust insurer appetite, but also with scale, ownership and capital strategy becoming more prominent alongside pricing. These transactions do not change the market overnight, but they do point to a clear direction of travel.”

Chesner added: “While individual transactions can attract attention, they sit within this broader trend. For trustees, the key is maintaining a clear focus on the fundamentals that underpin good outcomes, particularly as pricing conditions may be as competitive as they are likely to be in the near term. This means continuing to focus on insurer financial strength and capital backing, understanding the wider group and its long-term ownership model, and ensuring transaction processes are well prepared and properly test the market.”

Yona Chesner concluded: “Buy-in and buy-out transactions remain among the most significant financial decisions trustees will make. In what remains a competitive but increasingly complex market, strong preparation, clear governance and a thorough assessment of insurers continue to be critical for trustees.”

-ENDS-

Note to Editors:

Experience, people and a pioneering spirit is what sets them apart.

This year marks Cartwright's 40th anniversary in business. And with it, a celebration of the four decades they've spent honing their unique skillset to become the trusted constant for trustees and sponsors of small to medium defined benefit and hybrid pension trusts - an often badly-catered-for market.

They are proud to offer the level of service usually reserved for the big players; innovative, professional and totally bespoke. And, with direct access to a real person, an expert in their field.

Today, Cartwright has over 150 clients nationwide who rely on their actuarial, administration, investment, secretarial and governance services to keep them ahead of the curve.

And, that same pioneering spirit remains as they branch into new markets; applying their unique know-how to sectors of a similar nature and with similar problems; Charitable Trusts, Corporate Treasury, Employee Rewards and Funeral Trusts.

Find out more at:

[Cartwright Pension Trusts | The Pension Specialists for DB and Hybrid Schemes](#)

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