

2026 Company Profile^{*1}

We're a global company focused on helping people and businesses in Asia, Australia, Europe, Latin America, the Middle East, and North America build and protect their financial well-being.

A FORTUNE 500® company in business for 146 years, we're known for our expertise, innovative ideas and tailored solutions that help customers make financial progress, no matter their income, business, or portfolio size.

And while we have employees around the world, we're all bound by a common purpose: to provide you with access to the financial tools, resources, and information you need so you can live the life you want.

We aim to:

- Meet the needs of our more than 75 million customers^{*1} who rely on our expertise in retirement, insurance, and asset management.
- Attract, develop, and retain the best people in the business, offering an inclusive work environment grounded in integrity, respect, connection, and trust in offices in 27 nations and territories.^{*1}
- Give back to the communities where our employees live and work, supporting programs that help people learn more, earn more, and save more.
- Deliver value for our shareholders, who have placed their trust in us (Nasdaq: PFG).

Get to know us better. Read on to find key facts, awards and recognition, and financial highlights.

Financial data^{*1}

\$781 billion	Total assets under management
\$15.6 billion	Total GAAP revenues
\$1.2 billion	Net income attributable to Principal®
\$1.9 billion	Non-GAAP operating earnings ^{*2}
15.2%	Non-GAAP operating ROE ^{*3}

People

Approximately
19,000
employees worldwide

Financial Strength Ratings^{*4} for Principal Life Insurance Company and Principal National Life Insurance Company

"A+" Superior	A.M. Best Company: second highest of 13 rating levels
"AA-" Very strong	Fitch Ratings: fourth highest of 19 rating levels
"A1" Good	Moody's Investors Service: fifth highest of 21 rating levels
"A+" Strong	S&P Global: fifth highest of 20 rating levels

Recognition

Overall

- Listed as 263rd on FORTUNE's list of the **Largest 500 Corporations based on revenues**. (January 2026)
- Ranked 602nd on the Forbes Global 2000 list, which recognizes the **world's biggest and most powerful companies**, as measured by a composite ranking for sales, profits, assets, and market value. (June 2025)
- A member of Standard & Poor's **(S&P) 500®** since July 2002.

Retirement and Income Solutions

- Ranked **No. 1 with an "excellent" rating for DC plan sponsor web experience**. Dalbar, Inc (June 2025)
- Ranked **No. 3 with an "excellent" rating for DC plan participant website**. Dalbar, Inc (August 2025)
- Ranked **No. 3 for overall number of advisor awards** with 36 awards (two awards behind Empower, and seven awards behind Fidelity). NAPA Advisors Choice Awards (September 2025) Notably ranked top 3 in advisor support, mobile app, and financial wellness tools.
- Named the **No. 3 401(k) plan service provider by number of participants**. PLANSPONSOR Recordkeeping Survey. (June 2025)
- Ranked the **No. 1 employee stock ownership plan recordkeeper by number of plans**. PLANSPONSOR Recordkeeping Survey. (June 2025)
- Recognized as the **No. 1 defined benefit plan service provider by number of plans**. PLANSPONSOR Defined Benefit Administration Survey. (September 2025)
- Named the **No. 4 provider of pension risk transfers** by PRT sales based on assets. LIMRA, U.S. Group Annuity Risk Transfer Survey. (Q4 2024)

Asset Management

- Ranked the **No. 3 manager of hybrid target date CITs**, Sway Research (March 2026)
- Ranked a **Top 10 target date manager** *The State of the Target-Date Market*, Sway Research (March 2026)
- Principal Asset Management maintained **Moody's MQ1.br rating** in Brazil. (February 2025). *The Firm paid fees to Moody's in connection with the rating.*

- **Top-ranked among largest OCIO managers worldwide**. Pensions & Investments (2025). *Ranking for period as of March 31, 2025. The firm paid compensation for the right to promote the ranking.*
- Principal Thailand
 - Recognized with the **Best Asset Management Company Award**, with assets under management in mutual funds not exceeding THB 100 billion, SET Awards 2025. (November 2025)
 - **The first place for Provident Fund Awards in the Pooled Fund category for provident funds managed by asset management companies across all fund sizes**: Association of Provident Fund (AOP) (November 2025)
 - **Best Fund of the Year 2025**, Equity Fund: Money & Banking Awards 2025. (July 2025)
 - **Best Vietnam Equity Fund**, Hall of Funds 2025 by Finnomena (January 2025)
- Principal Indonesia
 - Recognized for **Best Syariah Equity Product (Gold Winner) for 1 Year Period** and **Best Syariah Equity Product (Silver Winner) for 3 Year Period**. Bareksa Fund Awards 2025.
 - Recognized for **Best Balanced Equities Fund in Indonesia**. IFN Investor Fund Awards 2025.
- Principal Malaysia
 - Received nine awards at the **LSEG Lipper Fund Awards 2025**.
 - Honored as **Asset Management Company of the Year** at The Asset Triple A Sustainable Investing Awards, 2025.
 - Recipient of multiple awards at Alpha **Southeast Asia's Fund Management Awards 2025**.

Awards are based on evaluations conducted by the respective providers and reflect results as of the dates listed. The Firm paid compensation related to these awards.
- Principal Islamic
 - **Cambridge Excellence Award for Sustainable Islamic Investment Innovation** and **Best Sukuk Fund in Malaysia 2026** by Cambridge Islamic Funds Awards (CIFA)

- IFN Investor **Best Sukuk Fund in Republic of Ireland - USD (2025)**

Awards are based on evaluations conducted by the respective providers and reflect results as of the dates listed. The Firm paid compensation related to these awards.

- Ranked one of the **Top 10 largest global real estate managers by total worldwide real estate assets** by Pensions and Investments.
Net of leverage, including contributions committed or received, but not yet invested; REOCs are included with equity; REIT securities are excluded), as of June 30, 2025. (November 2025)
- Principal Real Estate earned **GRESB 5-Star ratings (2025)** for its European Core and European Office strategies.*⁵
- Principal Real Estate named one of the **Top 10 largest managers of assets under ESG principles** by Pensions & Investments.
Based on worldwide real estate assets as of June 30, 2025 (November 2025)
- Principal Asset Management named winner of the **PERE 2025 Awards Data Center Firm of the Year, North America, and runner-up Data Center Firm of the Year, Global.** (March 2026)
- Ranked the 29th **largest manager of worldwide institutional assets under management** of 369 managers by Pensions & Investments.
Based on assets as of December 31, 2024 (June 2025)
- Principal Asset Management was recognized as **2024 Best International Equity Manager for MSCI in Latin America.** *Employees Provident Fund (EPF), Malaysia (May 2025)*

Benefits and Protection

- Ranked the **No. 1 provider for nonqualified deferred compensation clients**, based on the 2024 PLANSPONSOR NQDC Market Survey (excluding 457 plans). (July 2025)
- Named the **No. 2 provider of group benefits insurance (dental, life, vision, disability, accident, critical illness, hospital indemnity)**, based on participants. LIMRA 2024 U.S. Workplace Benefits Dental and Vision, Disability Insurance, Life Insurance, and Supplemental Health Insurance Surveys. (April 2025)
- Ranked the **No. 1 provider of small-case business life insurance**, based on 2024 CSIO and COLI case counts for cases up to \$5 million in total premium per case. IBIS Associates 2025 COLI/CSIO Survey of participating carriers. (August 2025)
- Ranked the **No. 1 provider of corporate-owned life insurance (COLI)**, based on 2024 COLI premium and case counts for case size up to \$5 million of total premium per case. IBIS Associates 2025 COLI Survey of participating carriers (August 2025)
- Ranked the **No. 1 provider of disability key person solutions**, based on participants. LIMRA 2025 Individual Disability Income Insurance Sales survey. (February 2026)

Workplace excellence

- Recognized as a **2026 World's Most Ethical Companies®** by Ethisphere. (March 2026)*⁶
- **Named a Best Place to Work** in Money Management by Pensions & Investments for the 14th consecutive year. (December 2025. The firm paid a licensing fee to promote the award)



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^{*1} Data for the trailing twelve months ending December 31, 2025 unless otherwise noted. See our most recent 10-K or 10-Q report for additional information and forward-looking disclosures. For other updates, visit www.principal.com.

^{*2} The company uses a number of non-GAAP financial measures that management believe are important in understanding and evaluating the normal, recurring operations of our businesses. These measures are not a substitute for GAAP financial measures. Therefore, we provide a reconciliation of the non-GAAP financial measures to the comparable GAAP financial measures as follows:

- Net income attributable to Principal Financial Group of \$1,185.1 million adjusted for net realized capital (gains) losses of \$178.3 million and adjusted for (income) loss from exited business of \$502.1 million equals non-GAAP operating earnings of \$1,865.5 million.
- Net income return on average equity (ROE) including accumulated and other comprehensive income of 14.3% adjusted for cumulative change in fair value of funds withheld embedded derivative and AOCI, other than foreign currency translation adjustment of (1.7) %, net realized capital (gains) losses of 1.5%, and (income) loss from exited business of 4.1% equals non-GAAP operating ROE of 15.2%.

^{*3} Non-GAAP operating earnings ROE equals trailing twelve months of non-GAAP operating earnings divided by average stockholders' equity available to common stocks excluding cumulative change in fair value of funds withheld embedded derivative and accumulated other comprehensive income (loss), other than foreign currency translation adjustment.

^{*4} Information as of December 2025. Our ratings reflect each of the rating agency's opinion of our financial strength, operating performance, and ability to meet our obligations to policyholders and are not evaluations directed toward the protection of investors or reflect any ratings actions or notices related to the U.S. life insurance sector generally. Such ratings are neither a rating of securities nor a recommendation to buy, hold or sell any security, including our common stock. Ratings are subject to revision or withdrawal at any time by the assigning agency, and each rating shall be evaluated independently of any other rating.

^{*5} 2025 Global Real Estate Sustainability Benchmark (GRESB) assessments representing data from 1 January 2024 to 31 December 2024. 5-star rating reflects top 20% worldwide performance. In order to receive a ranking, the Firm paid GRESB an application fee to be evaluated and rights to use the rating.

^{*6} 2026 World's Most Ethical Companies[®] honoree designation is awarded by the Ethisphere Institute. Principal received the 2026 designation based on results as of August 2025.

Third party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance of results. These ratings should not be construed as an endorsement by any client nor are they representative of any one client's evaluation.

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