

Investor Intelligence: Capital Markets Radar for Boardroom and IR Pros

Pinpoint signals. Predict threats. Influence strategy.

Your investors are making decisions about your company right now. The question is whether you have the intelligence to act before they do. Most IR Pros and Boardroom Pros are working from ownership data that is already stale, analysis that describes the past, and advisors who arrive only when a situation has escalated. By then, the window to shape outcomes has often already closed.

Investor Intelligence changes that. Our Capital Markets Radar gives you real-time insight into who holds influence in your shareholder base, what is driving their decisions, and what is likely to happen next, without leaving you to sift through wordy, long reports. Expert analysis that tells you what the signals mean and what to do about them before it matters.

Use cases: applying shareholder insights

Investor relations:

- › Understanding the ebbs and flows of the investor base to assist discussions with current or prospective shareholders
- › Ensuring executives meet with the right investors on roadshows and arming them with recent trading intelligence
- › Explaining what market factors are driving price action
- › Identifying and prioritizing best-fit investors using Fitzcores targeting, so outreach is focused on investors most aligned to your company's profile

Shareholder activism:

- › Early detection of hedge fund activity that indicates a hostile investor might be using derivatives to fly under the radar
- › Uncovering where vulnerabilities lie within the shareholder base and the influence of proxy advisors with each shareholder
- › Recognizing "investor wolfpacks," which represent what investors typically vote with a dissident during a proxy fight



M&A:

- › Gauging shareholder sentiment and identifying potential opposition
- › Monitoring investor churn and arbitrage investor activity
- › Applying record date investors to the vote identification process

IPO:

- › Reviewing which investors immediately rotated out from the initial allocation and spotting shareholders that built new/larger positions
- › Supplying insights for executives to understand volatility after the lock-up period ends

Part of the Computershare Investor Engagement portfolio

Investor Intelligence fits within a unified Investor Engagement portfolio designed to support influence across every critical moment:

- › **Investor Intelligence:** Capital Markets Radar for Boardroom and IR Pros
- › **Investor Relations:** The Engine powering IR Pros
- › **Georgeson Advisory:** Trusted Advisors guiding Boardroom Pros

Together, they give IR Pros and Boardroom Pros a connected system of intelligence, technology, and advisory capabilities built for the highest level of investor engagement.

What we deliver:

Seasoned advisors, not report generators. Unlike data providers that deliver ownership reports and leave you to interpret them, our team sits alongside yours, translating signals into decisions and available at every stage of the investor engagement cycle.

- › Expert interpretation of real-time market signals, as our advisors tell you what the numbers mean and what to do next
- › Integrated with Georgeson Advisory, your surveillance team is part of the same team advising on activism, proxy contests and M&A
- › The most complete picture of your shareholder base, including institutional investors and registered holders through Computershare's global registry

Contact us today:

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