



Activist Insight

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Activist Index trumps market in first quarter

Activist funds returned 12.51% in Q1 2013

The Activist Index, compiled by Activist Insight and comprised of 26 activism-focused hedge funds from around the globe, returned 12.51% net of fees in Q1 2013, outperforming the MSCI World Index by a notable 5.33 percentage points and the S&P 500 by 2.48 percentage points.

The Activist Index was buoyed by the performance of its top performing fund, which returned an impressive 79.26% net of fees over the first quarter. Excluding this apparent anomaly, the index still returned an outperforming 9.84% net of fees. Indeed, 17 of the 26 activist funds featured in the index individually outperformed the MSCI World Index over the quarter.

Assisted by a global stock rally which has seen the Dow Jones Share Index reach record highs, the impressive first quarter return of the Activist Index surpasses by far the 3.27% net return achieved by the index in Q4 2012, in a period where the MSCI World Index posted gains of 3.71%. The Q1 2013 return also tops that attained in the first quarter of last year, when activist funds returned a net average of 7.18%.

“Given these returns coincided with the beginning of what has become a record-breaking rally in equities worldwide, the data suggests activist hedge funds can continue to outperform even in a bull market, where opportunities to pick up undervalued stocks are typically less numerous,” said Activist Insight managing director Kerry Pogue.

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Activist Insight was founded at the beginning of 2012 by Nick Arnott and Kerry Pogue. The company provides the most comprehensive global information source on activist investment. This includes live alerts on activist investments, over 160 detailed activist manager profiles, over 1700 relevant company profiles, unique stats on activist campaigns and proxy battles, and much more.

If you would like more information about this topic, or to schedule an interview with Nick Arnott or Kerry Pogue, please contact Adam Riches at +44(0)20 7129 1314 or email press@activistinsight.com.