NEW SHAREHOLDER ACTIVIST INDEX REVEALS REWARDS OF ACTIVIST INVESTING

Activist funds have been outperforming the MSCI World Index since 2008

Activist Insight Ltd has published a new index which displays the mean annual net return of over 40 activist-focused funds since 2006. Barring periods of almost equal performance in 2009 and Q1 2012, the ‘Activist Insight Index’ has consistently outperformed the MSCI world index in the years following the global financial crisis in 2008. This trend is most notable in 2010 when the average activist-focused fund returned 20.54%, outperforming the MSCI world index by 10.99 percentage points. It is also worth noting that an investment strategy tracking the MSCI world index would incur fees not represented by the index, making its outperformance by the AI Index all the more pronounced.

Significantly, top performing activist-focused funds produced an average return 53.04 percentage points greater than that of the MSCI World Index between 2006 and 2011.

Company founder Nick Arnott opined, “Shareholder activism has been growing over recent years and we felt it was important to have a reliable indicator of the returns generated by these types of investor. It came as no surprise to see that engaging with companies can make a positive difference to returns with the best managers outperforming the index by some margin.”

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, 120 detailed activist manager profiles, over 1000 relevant company profiles as well as unique stats on activist campaigns, proxy battles and much more.

Their website can be accessed at www.activistinsight.com

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If you’d like more information about this topic, or to schedule an interview with Nick Arnott or Kerry Pogue, please contact Adam Riches at +44(0)207 129 1314 or email press@activistinsight.com