

Actions for Investors

that Companies value most

Practical actions to improve the efficiency and effectiveness
of your Company-Investor dialogue



THE INVESTOR FORUM

Top 5 actions to improve the **EFFECTIVENESS** of dialogue

1. **Provide greater transparency** to companies on which funds are invested in the company, and which are passive.
2. **Encourage joined-up meetings** with governance specialists, ESG experts, portfolio managers and, where appropriate, fixed income investors.
3. **Make access easy** - set up a corporate access desks to facilitate broader access and coordination across organisation (and maintain a generic contact@ email).
4. **Create targeted summaries** that describe your approach and one page expectation documents on specific issues – voting policies, diversity, human rights policy) to complement stewardship reports
5. **Instigate reverse road shows** to explain structure, approach and key focus areas (e.g. leverage Stewardship reporting), and provide clarity on key issues of interest for companies

Top 5 actions to improve the **EFFICIENCY** of dialogue

1. **Engage with companies directly** on key issues or areas where you want to learn more, especially regarding what appears in their reporting
2. **Deliver a consistent message**, so a company hears the same thing from portfolio managers and stewardship teams.
3. **Invest time in understanding** the nuances behind the numbers and metrics presented by companies.
4. **Collaborate with other like-minded investors** on key issues to amplify the collective voice and influence.
5. **Encourage companies to prioritise** the three or four issues relevant to the company's business.

Interested in diving deeper into these insights?

The Investor Forum's latest research provides best practices and lots of practical actions.

Get your hands on the full report to unlock valuable insights and enhance your approach to investor engagement and corporate communication.

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