

Collective Insight

See where your stewardship activity overlaps with peers: *confidentially — company by company and theme by theme.*

Our mission is to amplify investors' voices to enable better decision-making. To help overcome informational barriers and enable a new form of peer learning, we're launching a pilot initiative:

- Share your engagement records to gain insights into other investors' focus themes and company-level engagement objectives.
- Enhance your engagement effectiveness through contributing to academic research on engagement.

Participation is free and completely confidential-no data will be publicly disclosed.

WHAT WE'VE COLLECTED

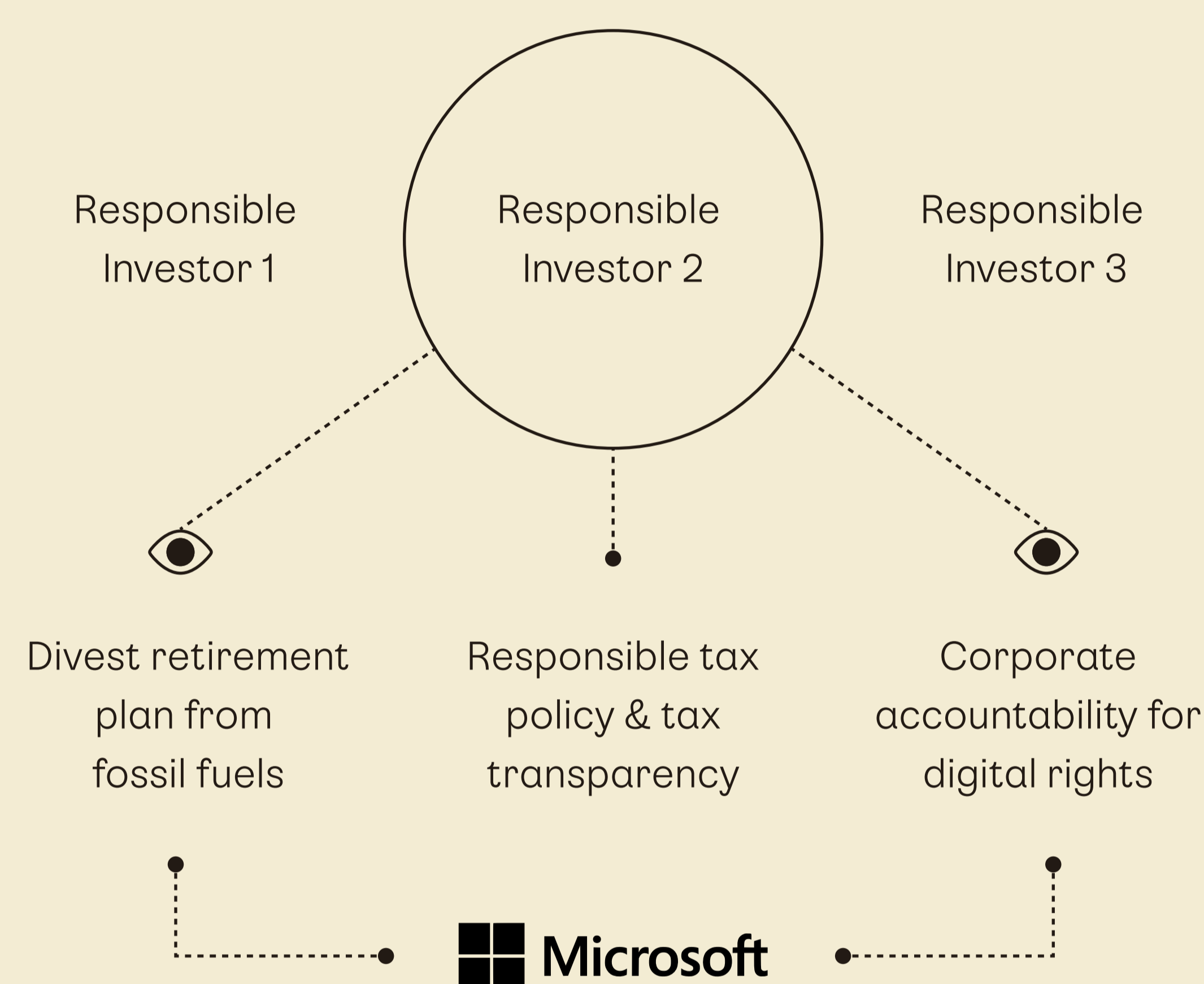
46

Our software platform and engagement tracking tooling currently integrates both *public and proprietary engagements* disclosed by 46 institutional investors managing over \$28 trillion in assets.

2023-2025

Q1-Q4 Engagement records are in scope to reduce data-sharing sensitivity

Fig. 1: We match company-level engagements to provide insights into your peers' engagements & to bring investors' voices into resonance.



PARTICIPANT BENEFITS

Insight

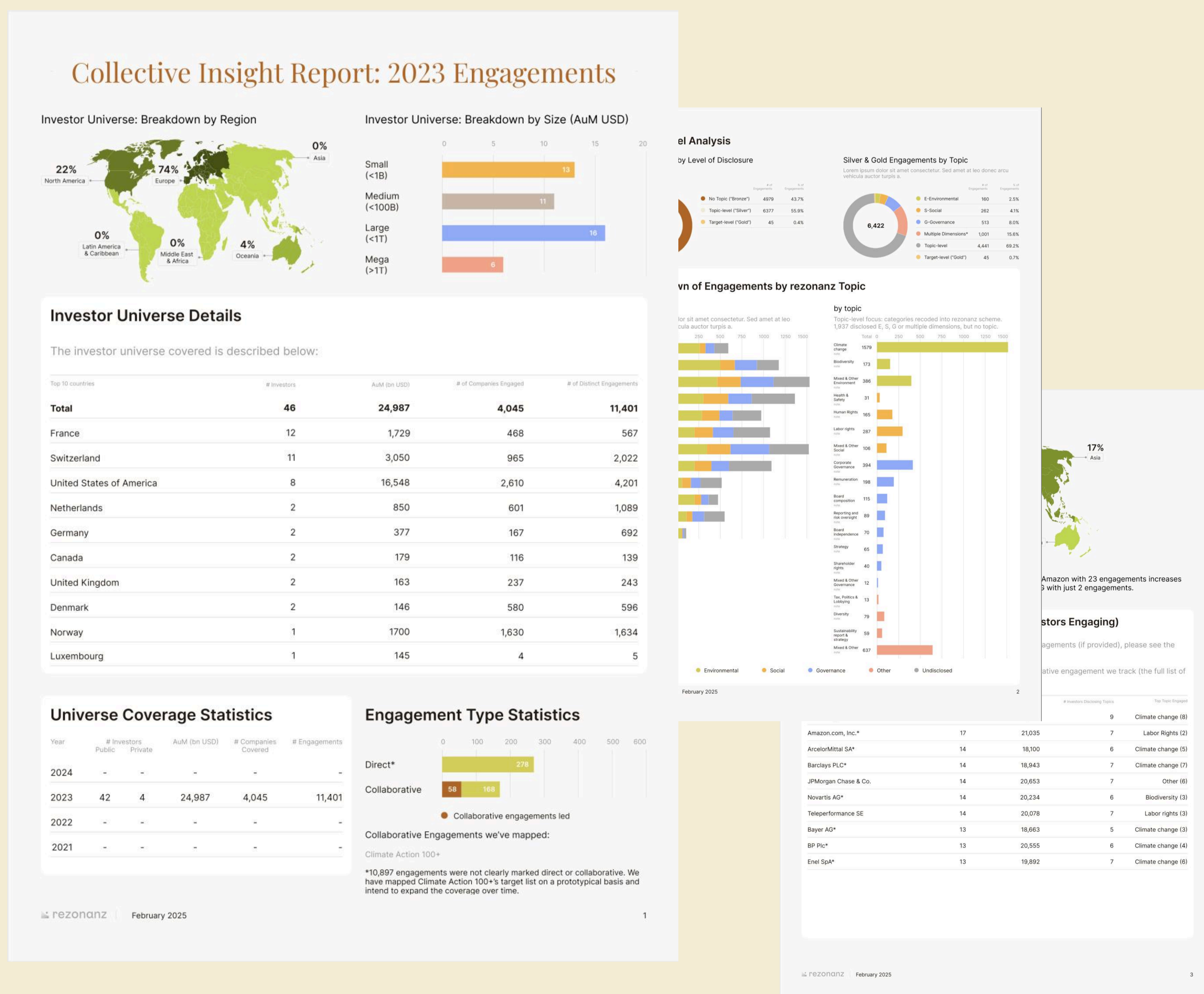
See where your engagements overlap with peers and identify gaps, emerging themes, and opportunities to focus stewardship resources more effectively.

Confidentiality

Receive peer insights while retaining control over what you share through Bronze, Silver, and Gold participation levels.

Impact

Contribute to industry-wide evidence on what engagement achieves and help advance stewardship effectiveness.



1 Confirm participation & affirm terms

Sign up for a [free account via our website](#) and affirm GTCs and pilot terms via the order form or [visit our pilot page for FAQs](#).

DEADLINE: JULY 29TH

3 We compile the data

We'll anonymize your data & match it with our database of engagement records to provide your custom overview.

Your data is anonymized, never publicly disclosed, and insights are only shared at your chosen disclosure level: Bronze, Silver, or Gold.

OUR DEADLINE: AUGUST 28TH

Innovation Project
developed at



2 Submit 2025 data

Upload records of engagement cases (including cases closed in 2025) via our [app](#) at your preferred level of detail to receive matched data from *all* investors in our database and a custom report:

- Bronze: disclose full list of all companies engaged
- Silver: disclose all companies engaged + topics you engaged on
- Gold: disclose all companies + topics + objectives/requests for change

A [template](#) is available, and we are prepared for wide variation in naming conventions used & objective descriptions.

DEADLINE: AUGUST 14TH

4 Review your results

Review your results and book a call. On the call, we'll share tailored insights from your participation in the pilot and overarching patterns we're observing.

CALLS THE WEEK OF SEPTEMBER 7TH

WHAT PARTICIPANTS RECEIVE

A matched view of your engaged companies against peer engagement activity

Access to a 5,000+ company engagement [overview](#)

A tailored pilot readout and [exclusive aggregate report](#)

WHAT PARTICIPANTS ARE SAYING

"Having visibility into fellow engagement actors' work benefits both companies and investors. Transparency enhances accountability, levels the playing field, and enables more targeted, efficient engagement. Understanding engagement from an issuer's perspective helps investors avoid duplication, collaborate effectively (where desired), and contribute to a broader, public-good outcome where all stakeholders benefit from company improvements."