



FRESH INVESTOR FORUM MANDATE DEMONSTRATES FOCUS ON CORPORATE ACCOUNTABILITY

(London, 22 July 2019)

The Investor Forum (“The Forum”) today announces that it has secured further funding commitment from leading asset managers and asset owners. The Forum’s unique approach encourages investors to work collectively to hold companies to account on long-term strategic issues. The objective is always to enhance and sustain the prosperity generated by UK companies.

The Forum’s track-record illustrates the UK’s leadership role in developing stewardship best practice. This renewed commitment will provide a platform for The Forum to continue to deliver effective engagement activities and related projects. Membership has increased from a founding group of 20 Members in 2016 to 48 asset managers and asset owners now.

23 collective engagements were undertaken to the end of 2018. 6 engagements have been initiated so far this year, which centre on strategic focus, capital allocation, succession planning and activist interactions. In each case, The Forum’s role is to ensure Board focus on the need for change.

The breadth of the Forum’s engagement activity demonstrates that good stewardship is not just about governance. Our stewardship 360 program illustrates our capabilities across the broader social and environmental spectrum.

Commenting on the development, **Business Minister Kelly Tolhurst, said:**

“Stewardship has never been more important in building trust between companies and their shareholders. The Investor Forum’s track record is an example of the UK’s global leadership in stewardship best practice.

This renewed investor commitment is a vote of confidence in the Forum and will allow it to continue engagement in support of our corporate responsibility and leadership diversity agenda.”

Simon Fraser, Chairman of the Investor Forum, said:

“We are delighted that this further three year commitment secures the resources that we need to lead effective collective engagements with UK companies and seek to enhance the dialogue between companies and their investors.

“Our growing membership includes asset owners and investment managers, and reflects the global nature of UK company ownership. We are grateful for the continued support from the investment industry, which allows us to go from strength to strength.”

Andy Griffiths, Executive Director of the Investor Forum, said:

“The success of The Investor Forum illustrates how the industry has responded to the challenge set by John Kay in his 2012 Review. Our not-for-profit institution has developed a model of collective engagement which delivers practical outcomes and positive impact for investors and all stakeholders in UK public companies.

“The collective effort of our Members provides a tangible example of the leadership and commitment required by investors to secure effective stewardship.”



NOTES TO EDITORS:

- The Investor Forum is an independent, not for profit organisation founded in October 2014. As at 30th June 2019, 48 organisations had become Members, including asset managers, insurance companies, pension funds, and endowments
- Members have around £17.5trn in Global assets under management, and have £700bn invested in UK equities, which represents about 30% of the FTSE All-Share market cap
- The purpose of the Investor Forum is to position stewardship at the heart of investment decision making by facilitating dialogue, creating long-term solutions and enhancing value. The Investor Forum has been involved in 23 comprehensive collective engagements with UK-listed companies since its inception, covering issues from succession and governance to the direction and execution of strategy, and delivering real change to the benefit of all stakeholders.
- The executive team comprises senior investment professionals with international experience in board positions, portfolio manager, asset owner, governance and investment banking sales and research roles
- For more information, go to www.investorforum.org.uk

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