



## The Activism Vulnerability Report Q4 2020



Jason Frankl and Brian Kushner, FTI Consulting

FTI Consulting's Activism and M&A Solutions team welcomes our clients, friends and readers to our sixth quarterly Activism Vulnerability Report, documenting the results of our Activism Vulnerability Screener from the recent fourth quarter of 2020, as well as other notable trends and themes in the world of shareholder activism and engagement. Almost one year ago to the day, we sat down to write this report for the fourth quarter of 2019...

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**“El IGS se propone acelerar el proceso de adecuación de la praxis de gobernanza a las cambiantes necesidades de la sociedad”**

### ESG: Investors Increasingly Seek Accountability and Outcomes

*Peter Reali, Jennifer Grzech, and Anthony Garcia, Nuveen*

The global pandemic motivated investors to increase their focus on the strategic impacts of environmental and social responsibility on long-term shareholder value. Now, more than ever, investors are using proxy votes to express their views on company behavior, rather than relying on...

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### The fall from favour of Danone's purpose-driven chief

*Financial Times*

A company's purpose is a core aspect of the organization: it influences the financial performance of company, and relates to its ownership characteristics, compensation policies, and strategy. Corporate purpose has been a topic of discussion for nearly a century, beginning with early...

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### The Next Decade Will Be a Leadership Game Changer

*Insead Corporate Governance*

Leadership is contextual. Successful leaders set agendas and choose strategies in accordance with opportunities and risks posed by the external environment. The ability of leaders to understand and interpret the vagaries of the...

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### Investor's Attention to Corporate Governance

*Peter Llieve, Pennsylvania State University*

Investors will have strong incentives to pay attention to the corporate governance structures of their portfolio companies if this attention contributes to better portfolio performance. However, because monitoring firms' governance is costly, it is possible that investors...

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### Sustainable Corporate Governance: A Way Forward

*Professor Florian Moeslein and Professor Karsten Engsig Sorensen*

The recently published 'Study on directors' corporate governance duties and sustainable' prepared by Ernst and Young for the European Commission (EY report) has attracted many comments, largely critical...

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### The Real Effects of Environmental Activist Investing

*S.Laksmi Naaraayanan and Kunal Sachdeva*

We study the real effects of environmental activist investing. Using plant-level data, we find that targeted firms reduce their toxic releases, greenhouse gas emissions, and cancer-causing pollution...

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