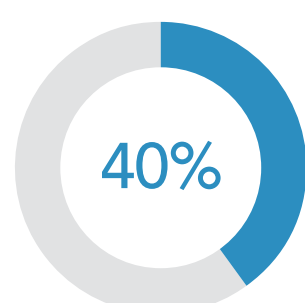


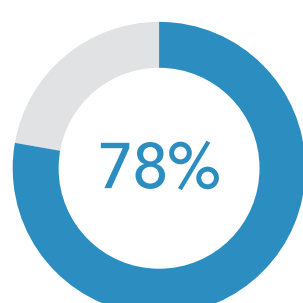
INCREASING COMPETITION FOR GLOBAL CAPITAL

Investment Community Is Already Globally Oriented



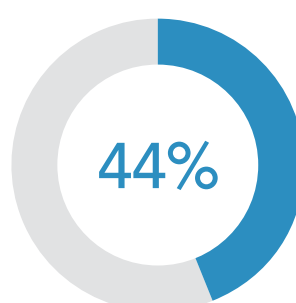
of institutional capital in the U.S. is managed in global funds.

Global Competition for Capital Is More Intense



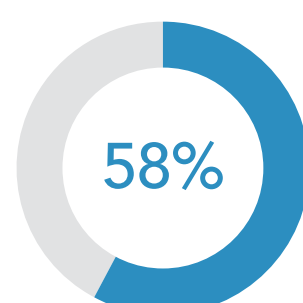
of investors believe there is increasing competition for capital across borders.

Corporate Access Is Changing



of investors believe brokers are increasingly being considered too conflicted to provide impartial advice.

Geographic Boundaries Are Blurring



of investors believe companies should expand their marketing efforts to reach a more global set of investors.

RECEPTIVE MARKET FOR NEW INVESTMENT IDEAS

Value Direct Engagement by Companies



66%

of investors find new investment ideas and meetings with companies more valuable (vs. broker or sell-side engagement).

Investors Are Looking for Non-Domestic IPOs



42%

of investors in the study have invested in a non-domestic IPO; and an additional 11% would consider it.

Ideal Number of Investor Interactions



2X 3X

per year, prior to investment. per year, after investment.

CORPORATE EVENTS AND ISSUES NOT CONSTRAINED BY REGIONAL BOUNDARIES

Activism Is on the Rise



71%

of investors anticipate an increase in cross-border shareholder activism.

Regulatory Landscape Is Significant in Investment Decisions



91%

of investors say the regulatory or political environment is important to their investment decision.

Investors Call for Greater Disclosure of Regulatory Risks

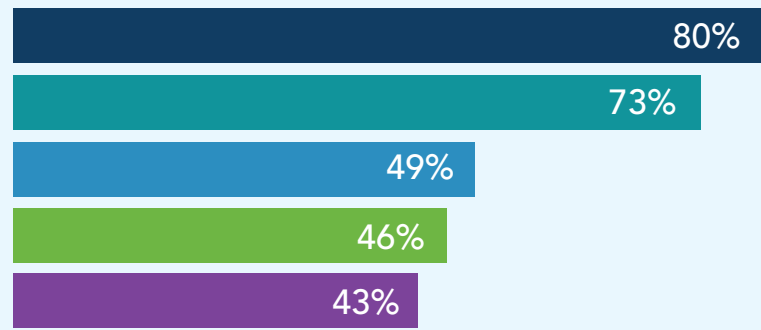


93%

of investors say companies should disclose more information about the potential risks of regulation, and its impact on operational and financial performance.

EVOLVING INVESTOR INFORMATION SOURCES

Most Important Information Sources



Broker and Sell-Side Research
Industry and Market Research
Direct-Company Interactions
Company-Generated Sources
Financial and Trade Media

For more IR and shareholder-engagement insights, visit: <http://fticonsulting.com/ir>.

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