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Euronext Corporate Services unveils results of its first-of-its-kind European survey showing that SRD II makes shareholder identification a new norm for issuers

- **Key findings of the survey show increase of +38% in the number of European listed companies using shareholder disclosure request (SDR) to identify their shareholders**
- **Euronext Corporate Services is ideally positioned in Europe for Shareholder Analysis services to issuers**
- **New “Bond-holder Identification” service is launched to further facilitate issuers’ dialogue with their debt-investors**

Paris – 01 December 2023 – Euronext Corporate Services, in partnership with Proximity Ltd, unveils the results of a first-of-its-kind European survey on shareholder identification for European issuers after the implementation of the Shareholders Right Directive II (SRD II) in 2020. Euronext demonstrates through this survey that listed companies, including small & mid-caps, increasingly identify their shareholders. Euronext accompanies this trend by providing innovative solutions to meet these new corporate sustainable finance needs.

The research, conducted by Proximity Ltd and Euronext Corporate Services among more than 5,000 European listed companies, highlights a 38% increase in the number of listed companies using share registers in 2022 compared to 2021, with 863 issuers proactively engaged in identifying their shareholders. In 2022, 474 small and mid-sized companies are classed as active in identifying their shareholders, an increase of +73% compared to 2021. The survey also analyses main trends in shareholder disclosure request practices based on both the profile of the companies and per country in Belgium, France, Germany, the Netherlands and Portugal. The detailed results of the survey are available in the report [“How issuers across Europe use this untapped benefit of SRD II”](#).

These evolutions mark a positive change and a new norm in the way European listed strengthen their corporate governance. Shareholder Analysis is the first product in a comprehensive suite of

Euronext Corporate Services solutions dedicated to supporting and advising corporate issuers on their shareholders engagement and communication roadmap, which includes:

- Shareholder (equity) and bondholder (debt) identification and analysis for governance readiness and general meeting preparation
- IR.Manager®, the advanced investor relations platform that now integrates Shareholder-ID and more ESG data on companies' institutional owners
- ESG Advisory, analysis of sustainable investment practice, preparation of regulatory reporting, and crafting companies' ESG story.

Euronext Corporate Services and its partner Proximity Ltd provide share register management for several hundred European listed companies, with enriched analysis included since 2020. Euronext Corporate Services has designed its Shareholder Analysis service to be an end-to-end shareholder consultation service enabling corporate issuers to manage their shareholder register and have it enriched and analysed with data mapping, categorisation, investment profile and ESG sensitivity assessments. With an SRD II-aligned solution, proven cutting-edge and automation technologies and teams of experts across Europe, Euronext Corporate Services guarantees the completion of the process in line with European rules, and specifically with data protection safeguards.

New bond-holder identification service

Given rising interest rates and approaching debt maturities, companies are facing an increasing need to refinance their debt. In this context, a Debt-holder engagement strategy is critical. In partnership with Proximity Ltd, Euronext Corporate Services now provides within its Shareholder Analysis service, a new **bond-holder identification solution for French companies**. Based on regulated source from SRD II, Euronext Corporate Services is now able to deliver a Bond-holder register per listed bond instrument, and make it analysed for an engagement-ready document.

Euronext is actively committed to supporting listed companies in building their investor dialogue and ESG strategy, as ESG is a key factor in the investment decision-making process. Euronext support listed and borrowing companies in their dialogue with their shareholders. This dialogue is essential for the company to anticipate investors' sensitivity to non-financial performance, address governance topics, build regulatory reporting and organise successful Annual General Meetings.

Mathieu Caron, Head of Primary Markets at Euronext, stated: *"Our Shareholder Analysis product offering and new analysis survey mark a step further in our support for listed companies in continuously engaging in a strong and transparent dialogue with their shareholders. This is part of Euronext's ambition under our Sustainable Finance strategic pillar. This first-of-its kind European survey on Shareholder Identification practices highlights primarily that the SRD II directive has liberalised the use of shareholder consultation, which is critical for companies of all sizes with ambitious growth and ESG strategies. We welcome the successful adoption of the SRD II framework by listed companies, which improves transparency in their dialogue with final shareholders. We are now, as a consequence of the directive, able to provide more efficient data collection and management, and are seeing an increasing number of issuers choosing to use this service and are moving further with bond-holders engagement service."*

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About Proximity

Proximity connects the world’s ecosystem of issuers, intermediaries and investors digitally in real-time, bringing unprecedented transparency, efficiency and accuracy to traditional manually-based processes. Our global ground-breaking solutions give public companies confidence that their AGM/EGM agendas are transmitted as “golden source”, and each step of the process is reconciled and confirmed. As the leading investor communications platform, we provide our clients with scalability, visibility and full compliance. We are backed by a global consortium of the industry’s most influential institutions (BNP Paribas, BNY Mellon, Citi, Computershare, Deutsche Bank, Deutsche B rse, HSBC, J.P. Morgan, Mediant, State Street). For more info, visit www.proximity.io.

About Euronext

Euronext is the leading pan-European market infrastructure, connecting European economies to global capital markets, to accelerate innovation and sustainable growth. It operates regulated exchanges in Belgium, France, Ireland, Italy, the Netherlands, Norway and Portugal. With more than 1,900 listed issuers and around €6.2 trillion in market capitalisation as of end September 2023, it has an unmatched blue-chip franchise and a strong diverse domestic and international client base. Euronext operates regulated and transparent equity and derivatives markets, one of Europe’s leading electronic fixed income trading markets and is the largest centre for debt and funds listings in the world. Its total product offering includes Equities, FX, Exchange Traded Funds, Warrants & Certificates, Bonds, Derivatives, Commodities and Indices. The Group provides a multi-asset clearing house through Euronext Clearing, and custody and settlement services through Euronext Securities central securities depositories in Denmark, Italy, Norway and Portugal. Euronext also leverages its expertise in running markets by providing technology and managed services to third parties. In addition to its main regulated market, it also operates a number of junior markets, simplifying access to listing for SMEs. For the latest news, go to euronext.com or follow us on Twitter (twitter.com/euronext) and LinkedIn (linkedin.com/euronext).

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