



INVICTUS SENTINEL monitors and alerts you on critical trading in your clients' stocks that detects **early signs of activist involvement**, ownership shifts, and hard-to-identify activist tag-along investors.

Designed specifically for law firms and investment bankers, **INVICTUS SENTINEL** is a **proprietary data-driven platform** that tracks ownership changes far in advance of public filings and uncovers potentially impactful non-filers.

With **Alliance Advisors' SENTINEL**, you can monitor market movements from your desktop and **engage your clients proactively**, with actionable data, ahead of public disclosure and **ahead of your competing advisors**.

Why Choose INVICTUS SENTINEL?

INVICTUS SENTINEL empowers your team with visibility into institutional shareholder behavior. Built to simplify complex trading data, INVICTUS SENTINEL tracks institutional investor activity beyond standard 13F filers, including pension funds, sovereign wealth funds, non-filing hedge funds and foreign investors.

The platform is powered by vast proprietary institutional proxy voting data from thousands of shareholder meetings, meticulously archived for over 20 years. Our data, matched with a dedicated analyst, offers a level of insight and precision unavailable from mainstream industry providers that are dependent on the repackaging of stale 13F data.

Program and Platform Features



- The platform is designed for law firms and investment banks, putting data driven ownership intelligence directly on their desktops, allowing advisors to proactively engage clients with meaningful insights directly impacting defense strategies.
- Monitoring of buyers and sellers of your client's stock intraweek, tracking activity beyond standard 13f filers, including pension funds, sovereign wealth funds, non-filing hedge funds and foreign investors.
- Identifies and alerts on activist accumulation and/or stock sales. Provides intuitive cost basis data on filing institutions.
- Identifies pile on wolf-pack accumulations by secondary activists.
- Displays Institutional voting profiles, policies, and proxy advisory influence of non-activist institutions. Valuable for assessing activist or management support levels.

Platform Attributes



- The platform is presented as an enterprise offering, not as an annual license. Pricing is a fixed monthly cost per ticker, and tickers can be changed each quarter, if desired.
- Available in minimum blocks of five ticker symbols, which can be easily accessed through an advisor portal.
- Alliance Advisors coordinates all DTC and relevant data access with client through a concierge level service for your firm.
- Data alone does not tell the full story; therefore, a dedicated analyst will be available for trade interpretations, deep dives into investor backgrounds and tendencies.

Advisor Benefit



- Provides the advisor with actionable data ahead of public filings which allows for defense strategies to be fine-tuned in real time.
- Changes in ownership data provide opportunities for increased and meaningful weekly client dialog. Superior ROI through billable hours as compared to product costs.
- Sets advisors apart from the competition by providing weekly ownership intelligence that drives defense strategies while staying ahead of surprise ownership shifts.

Who is
Alliance
Advisors?

Alliance Advisors is the largest worldwide provider of shareholder focused services for publicly traded companies.

In 2024, we completed over 1,200 assignments, across 14 countries in North America, EMEA, LATAM & APAC, representing \$12 trillion in stock market capitalization.

Every day we monitor \$6.3 billion in trading activity for over 200 companies.

allianceadvisors.com



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