

PRE-RECORD DATE SURVEILLANCE SERVICES

Companies must ensure a clear and up-to-date understanding of their ownership profile well before the record date. This proactive approach is essential for navigating the Annual Meeting process and maximizing success during shareholder votes.

WHY CHOOSE SODALI & CO?

Our new program delivers a current, precise view of your shareholder profile, helping you identify unusual stock accumulations before the record date. We leverage decades of deeply curated data and combine it with cutting-edge AI to deliver unmatched insights.



KNOW YOUR DATA

Gain real-time insights. Don't rely on outdated 13F filings - they can miss critical shareholder changes and evolving trends.



KNOW YOUR SHAREHOLDERS

A comprehensive view of how various advisors and their voting behavior influence shareholders.



MITIGATE RISK

We provide detailed insights into broker-dealer or derivative positions that could significantly impact ownership profile.



REAL-TIME INFORMATION

We analyze short interest, trading volumes, block trades, activists, foreign investors, non-13F filers, and retail investor trends to uncover issues that may influence voting outcomes.

AI-DRIVEN ANALYSIS

By integrating AI into surveillance and intelligence processes, organizations gain greater certainty and agility, staying ahead of potential challenges and maximizing success during critical events such as annual meetings and shareholder votes.



**STAY AHEAD OF POTENTIAL VOTING CONTROL
CHALLENGES BY ADDRESSING ISSUES EARLY**

CONTACT US