
Legion Partners Asset Management was formed in April 2012 with the mission of becoming the premier small-cap activist fund for high net worth and institutional investors. Legion's strategy utilizes deep fundamental research, concentrated positions, and professional long-term oriented active management to achieve superior risk-adjusted returns. Our private equity approach to investing in public equities helps to reduce risk and catalyze change. Our investors include pension funds, foundations, family offices, high net worth individuals and other institutional clients. Investing primarily in equity and debt securities of small and mid-cap North American companies, we seek strong fundamental businesses that are trading at significant discounts to their intrinsic value. Our deep research and intimate knowledge of each investment combined with professional long-term oriented engagement forms the framework of our success.



DEEP DUE DILIGENCE

Our constant focus on deep due diligence at every stage of the investment process helps us to build an intimate knowledge of our holdings and allows us to continually evaluate the merits and risk/reward of our positions as the facts and market prices change over time.



RESPONSIBLE ACTIVISM

We believe long-term oriented responsible active ownership and good corporate governance helps facilitate sustained superior performance. Our focus on improving alignment and culture is a cornerstone of our activism.



SUPERIOR LONG-TERM RETURNS

We are active deep value, long-term oriented investors. Success is achieved through combining the strengths and reputations of institutional partners and high net worth investors with our active management strategy.

Our formula for success is based on conducting very deep fundamental analysis and due diligence on potential investments and using long-term oriented professional engagement to help catalyze and unlock value for all shareholders. We have significant experience in professional shareholder activism and are singularly focused on executing our strategy for the long-term benefit of all shareholders.

We believe that good companies with strong underlying fundamentals that embrace corporate governance best practices have the best opportunity to earn superior returns over time, but in some cases are not valued correctly in public markets. This disconnect can persist for a long time, and we believe responsible long-term oriented activism can be successful in helping to unlock value and increase companies' ability to produce sustained superior results.

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