Hosking Partners ESG and Active Ownership

June 2026

Q2 2026 - ESG and Active Ownership Report - Hosking Partners

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Active Ownership Report · 24 August 2026 · 1 min read

Q2 2026 - ESG and Active Ownership Report After another dynamic quarter, dominated by trillion-dollar IPOs and ongoing geopolitical turmoil, we take a different approach in our Active Ownership Report highlighting stewardship examples that explore how closely linked voting and engagement activities can be as long-term investors.

Published August 2026

Reading time 1 min read

Format Active Ownership Report

After another dynamic quarter, dominated by trillion-dollar IPOs and ongoing geopolitical turmoil, we take a different approach in our Active Ownership Report highlighting stewardship examples that explore how closely linked voting and engagement activities can be as long-term investors. Here we discuss our activity with speciality chemical company, Synthomer, and Japanese Financial Services firm, Kyoto Financial. Both examples where, unusually, we voted against the recommendation of ISS and instead with management to varying outcomes. Our series, "Hidden ESG", continues by looking at Swedish nuclear services company, Studsvik AB, which is a position the team initiated in the portfolio in 2025. Despite being one of the cleanest energy sources available, nuclear continues to have a globally conflicting reputation. It is one which we deem could be integral to long-term decarbonisation plans and energy security. The capital cycle for Nuclear is long, and one that has had limited investment in recent decades. We hope you enjoy the change in format this quarter and look forward to continuing to evolve how we share insights and our active ownership approach to stewardship along the way!

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Podcast

10 Aug 2026

Merryn Talks Money - The Capital Cycle Is Turning Luke Bridgeman, joins Merryn Somerset Webb for a wide-ranging exploration of our portfolio including discussions on Japan, energy markets, and shipping.

1 min read

Quarterly Report

21 Jul 2026

Q2 2026 - Quarterly Report Commentary The Hosking Partners strategy delivered another strong period of absolute returns, adding 11.7% (net) in the second quarter and taking year-to-date returns to 15.3% (net). After materially outperforming the MSCI ACWI benchmark in the first quarter, the strategy's double digit returns in the second quarter trailed the benchmark as a near-term return to animal spirits [...] 8 min read

Podcast

21 Jul 2026

Value Investing with Legends Podcast The Capital Cycle: Finding Opportunity Where Others Aren't Looking 1 min read

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