

Kimmeridge Comments On Proposed Merger Of Coterra And Devon

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Kimmeridge Energy Management Company, LLC, a private investment firm focused on the energy sector, today issued the following statement in response to an announced definitive agreement for Coterra Energy (NYSE: CTRA) and [Devon Energy](#) (NYSE: DVN) to merge in an all-stock transaction.

Mark Viviano, Managing Partner at Kimmeridge, said: "As a significant shareholder in both companies, we are supportive of a combination that can unlock meaningful shareholder value. We continue to believe that will require portfolio rationalization and a renewed focus on the Delaware basin. Having formally submitted director nominees, we now eagerly await the disclosure of Coterra's slate, as well as the S-4 merger filing to better understand the competitive process its Board undertook to reach this outcome."

Kimmeridge previously sent an Open Letter to Coterra's Board of Directors on November 4, 2025, outlining urgent and very practical steps to address Coterra's governance failures and to unlock shareholder value.

About Kimmeridge

Founded in 2012 by Ben Dell, Dr. Neil McMahon and Henry Makansi, Kimmeridge is an alternative asset manager focused on the energy sector. The firm is differentiated by its direct investment approach, deep technical knowledge, active portfolio management, proprietary research, and data gathering. Public engagement is one of the firm's core strategies, launched in early 2020 to reform the public E&P sector and generate differentiated returns. Since inception, the platform has outperformed the S&P 500 and relevant indices 2x on an annualized basis, under the direction of Managing Partner, Mark Viviano. Prior to joining Kimmeridge, Mr. Viviano spent nearly two decades at Wellington Management, responsible for firm-wide equity research coverage of the North American and international E&P sectors, as well as co-portfolio manager for the Global Natural Resources and the Select Energy Opportunity strategies.
www.kimmeridge.com

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