# IR MAGAZINE FORUM – CANADA

Monday, October 19, 2020
Virtual event: Live: 9:00 am - 2:30 pm Eastern Time. Available on replay

**Agenda:** All times below are in ET (Eastern)

**8.30 am** **Virtual platform opens: Networking and introductions**

**9.00 am** **Welcome to the forum**
**Laurie Havelock, editor-at-large, *IR Magazine***

**9.15 am** **Big picture trends: Impacts on the economy, investor sentiment and IR in 2020 going into 2021**
A short and sharp economic briefing will set the scene for the day's discussions. Take stock of where we are right now, where we could be heading and what it means for investor relations. We will discuss the pandemic, global politics, how the Canadian economy is evolving and potential questions from the investment community for issuers in 2021.
**Brett House, deputy chief economist, Scotiabank**

**9.45 am** **Targeting in a virtual world: Accessing new pools of investment and increasing demand among institutional investors**
How to approach targeting in a volatile market that's risk averse? Discuss the alternative sources of capital that are available and how IR teams can better access them in the new normal. We will explore how the pandemic has changed the investor outreach landscape, how to adapt your IR campaign, guidance, marketing strategies to engage investors, running virtual meetings effectively and getting through to generalist investors in Canada, US and Europe.
**Adam Borgatti, senior vice president of corporate development and investor relations, Aecon**
**Clare-Marie Hill, corporate access, Fidelity Investments**
**Dave Hughes, vice president of investor relations, Imperial Oil**
**Moderator: Omar Khafagy, manager, corporate access, company services. TSX**

**10.45 am** **BREAKOUT SESSIONS:**
Choose one of the two topics below to participate:

**What does the growth of ESG ETFs in Canada mean for IROs?**
Pre-pandemic, ETFs remained the investment industry's fastest growing product segment with ESG focused ETFs gaining traction. Canada had more than 30 pure-play ESG ETFs and it was primed for further growth. During this session, we will explore the impact of the Covid-19, what this means for IROs and how IR programs need to adapt.
**Margaret Dorn, senior director, ESG product strategy, S&P Dow Jones Indices**
**Moderator: Andres Rincon, director of ETF strategy, TD Securities**

**Strategies to engage retail investors: Strengthening your message in an evolving market**
With an unprecedented level of volatility in the market and uncertainty in the economy, it's a challenging time to tell a consistent equity story. Public companies are encouraged to focus on their long-term value proposition, while also providing short-term operational updates. In this session, we will explore practical advice on how to adapt your communications and the digital tools available to increase engagement and ensure the market understands your story.
**Taylor Thoen, CEO and executive producer, BTV**
**Moderator: Laurie Havelock, editor-at-large, *IR Magazine***

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**11.15 am** **Making the absolute most of the IR budget**

With budgets shrinking and responsibilities expanding, what should IROs be focusing on in 2021? We'll discuss budgeting best practices, the possibility of sharing services between IR teams, making site visits efficient, safe, virtual and appealing all while successfully expanding investor bases. If you are operating as a team of one, where should you put your time and money? What constitutes an impactful online IR campaign?

**Mark Chyc-Cies, vice president of strategy, planning, and IR, Gibson Energy**
**Barbara Henderson, VP of corporate communications, Bear Creek Mining Corporation**
**Jason Paltrowitz, director and EVP, corporate services, OTC Markets Group**
**Joe Racanelli, director of IR and communications, Sherritt International Corporation**
**Moderator: Ben Ashwell, editor, *IR Magazine***

**12.15 pm** **Networking break: Expand your global network**

This feature works like speed dating. You will be matched 1:1 at random with another attendee and you have five minutes to decide whether you'd like to exchange contact details. It's good fun!

**12.30 pm** **Q&A with the buy side and sell-side: How are investor and analyst expectations evolving going into 2021?**

As the pandemic settles in, capital markets become more global and active money continues to flow into passive funds, we ask portfolio managers and analysts how these trends impact them, and how that changes their expectations of investor relations teams. Gain insight into how analysts build their models and learn how you can better communicate your equity story with the most useful data. We'll discuss what investors want to see in terms of reporting, short and long-term business impact of Covid-19, virtual meeting do's and don'ts and direct corporate access requests vs. sell-side analysts.

**Karen Ko, former global equity analyst and portfolio manager**
**John Morgan, senior vice president, Corbin**
**Gervais Williams, head of equities, Premier Miton Group**
**Moderator: Laurie Havelock, editor-at-large, *IR Magazine***

**1.30 pm** **ESG best practices: Taking an integrated approach to investor expectations in the current climate**

What is the impact of Covid-19 on ESG? What are the emerging trends? This session will answer some common questions around the pandemic and misconceptions about the role of IR in the ESG ecosystem. Hear about the ESG-related drivers and challenges from both the investment side and the public company side to identify the gaps between what the markets are looking for and what public companies are communicating around ESG factors.

**Jonathon Ennis, AVP, senior analyst, Mackenzie Investments**
**Marie-Josée Privyk, head of ESG innovation and customer success, Novisto**
**Ian Tharp, former vice president of sustainability**
**Moderator: Karoline Hunter, head of company services, TSX**

**2.30 pm** **Wrap up and end of event**