

IR Magazine Forum – Canada 2021

Future strategies in a disrupted world

Thursday, April 1

LIVE AND VIRTUAL

The [IR Magazine Forum – Canada](#) is back on April 1, 2021, to give Canadian IR professionals practical, take away ideas to implement into their IR program.

This year you will hear the latest advice on targeting, including how to respond to the changing nature of the traditional sell-side, how to engage with retail and passive investors, and the future for roadshows.

As well as this, buy-side, sell side and issuing companies will share advice on post-pandemic strategies, ESG reporting, and the use of new technologies.

Agenda at a glance

All times are in ET (Eastern time)

11.30 am	Welcome to the IR Magazine Forum – Canada
11.45 am	Capital markets trends, market opportunities & social investment drivers
12.15 noon	Disruptive technologies: Decoding the impact of data on your company
12.45 pm	Networking and coffee break
1.15 pm	Shaping the IR program in 2021: Future strategies
2.00 pm	Post-crisis communications: How to reflect the equity story
2.45 pm	Networking and coffee break
3.15 pm	The changing nature of brokers & accessing new investors
4.00 pm	[Roundtable Discussion]: Improving the fundamentals of IR
4.30 pm	ESG case study: One company's integrated ESG program
5.00 pm	ESG implementation, governance & buy-side perspectives
6.00 pm	End of forum

Full agenda

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11.30 am	Welcome to the IR Magazine Forum – Canada <i>Networking and opening remarks from the chair</i>
11.45 am	Capital markets trends, market opportunities and the social investment drivers of change <i>A big picture discussion on macroeconomic and megatrends for 2021. The session will assess the current financial environment, prospects for economic</i>

activity in 2021, and the drivers behind ESG and portfolio management decisions.

Philip Petursson, *chief investment strategist and head of capital markets research*, **Manulife Investment Management**

- 12.15 noon **Disruptive technologies: Decoding the impact of data on your company**
- As the rise of passives and data-driven investment causes increased fluctuations in stock prices, it's challenging to know how to respond. This session will help IROs understand the mechanics of data-driven investment, how to recognize the effects on your stock and the potential implications for your role as IRO.*
- 12.45 pm **Networking and coffee break**
- 1.15 pm **Shaping the IR program in 2021: Future strategies**
- Last year saw an evolution in best practice IR in response to Covid-19 and a shift in overall marketing strategy. This session will assess what the future holds for 2021 and what the return to 'normal' may look like in practical terms. What is the industry consensus on a move to in-person? How can IROs continue to maximize the use of virtual for the foreseeable?*
- 2.00 pm **Post-crisis communications: How to reflect the equity story going forward**
- As the pandemic persists through early 2021, it's hard to speculate on the prospects for your company's stock. This session will give ideas to help you effectively communicate your equity story in light of continued impacts on the business. How can IR give better guidance while still facing the pandemic?*
- 2.45 pm **Networking and coffee break**
- 3.15 pm **The changing nature of brokers and accessing new pathways to investors**
- This session will examine the best ways to access new pools of investors in the current climate. How can IROs react to the changing nature and role of brokers? What pathways are there to retail vs institutional investors? What are the threats and opportunities posed by new day traders that have driven trading volumes and volatility, and how can IR benefit?*
- 4.00 pm **ROUNDTABLE DISCUSSION: Improving the fundamentals of IR**
- In this interactive session, you will hear from and share ideas with IROs across sectors to hear advice and best practice on the IR basics. From budgets and pricing structures to improving the effectiveness of traditional advertising and social media, join this roundtable to have your questions answered from IROs and share your thoughts on creating the best possible IR program.*

4.30 pm **ESG case study: One company's integrated ESG program**

Hear how one company has integrated sustainability into its strategy, from initiation to reporting. What are the benefits of such an approach? How important is taking a risk governance approach to ESG?

5.00 pm **Focusing on what matters: ESG implementation, governance and buy-side perspectives**

There is widespread consensus on the principles and benefits of ESG, but how can IR teams introduce an ESG program in practical terms? This session will bring different perspectives to answer that question. What is the buy side looking for and what are its key reporting metrics? How can IROs navigate ESG indices and data-driven investing? What are some tangible ways to improve reporting, and how does the IRO manage the lack of standardization?

6.00 pm **End of forum**

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