

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 and social investment drivers of change
12.15 noon	ETFs and the evolution of passive investment
12.55 pm	Networking and coffee break
1.15 pm	Shaping the IR program in 2021: Future strategies
2.00 pm	Managing crisis communications: How to reflect the equity story
2.45 pm	Networking and coffee break
3.15 pm	The changing nature of brokers and accessing new investors
4.00 pm	[Roundtable Discussion]: Improving the fundamentals of IR
4.30 pm	ESG case study: Aecon’s integrated ESG program
5.00 pm	ESG implementation, governance and buy-side perspectives
6.00 pm	End of forum

Full agenda

All times are in ET (Eastern time)

- 11.30 am **Welcome to the IR Magazine Forum – Canada**
Ben Ashwell, *editor, [IR Magazine](#) and [Corporate Secretary](#)*
Networking and opening remarks from the chair
- 11.45 am **Capital markets trends, market opportunities and the social investment drivers of change**
A big picture discussion on macroeconomic and megatrends for 2021. The session will assess the current financial environment, prospects for economic 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 **ETFs and the evolution of passive investment**
This session will explore the continued growth of the ETF industry, the impact of high-profile thematic ETFs on market volatility, and how the line between passive and active investment is becoming increasingly blurred.
Billy Eckert, *head of surveillance and intelligence, [Q4](#)*
Anna Paglia, *managing director, global head of ETFs and indexed strategies, [Invesco](#)*
Tim Human, *senior reporter, [IR Magazine](#)*
- 12.55 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?
Karen Keyes, *head of investor relations, [Canadian Tire Corporation](#)*
Joe Racanelli, *director, investor relations and communications, [Sherritt](#)*
Ben Ashwell, *editor, [IR Magazine](#) and [Corporate Secretary](#)*

- 2.00 pm **Managing crisis communications: How to reflect the equity story**
- 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?*
- Darren Dansereau, senior vice president and portfolio manager, [QV Investors](#)
Jill MacRae, vice president, investor relations and ESG, [Home Trust Company](#)
Bill Zawada, vice president, business development, [Laurel Hill](#)
Tim Human, senior reporter, [IR Magazine](#)
- 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?*
- Kelly Earle, vice president, communications, [Skeena Resources](#)
Marc Jasmin, senior director, investor relations, [IMV](#)
Chris King, senior vice president, corporate services, [OTC Markets Group](#)
David Whyte, CEO, [Irwin](#)
Ben Ashwell, editor, [IR Magazine and Corporate Secretary](#)
- 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.*
- Ben Ashwell, editor, [IR Magazine and Corporate Secretary](#)
- 4.30 pm **ESG case study: Aecon'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?*
- Adam Borgatti, senior vice president, investor relations, [Aecon Group](#)
Yonni Fushman, executive vice president, chief legal officer, chief sustainability officer and corporate secretary, [Aecon Group](#)
Tim Human, senior reporter, [IR Magazine](#)

5.00 pm

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?

Anthony Garcia, *director of responsible investing*, **Nuveen**

Leahruth Jemilo, *head of ESG practice*, **Corbin Advisors**

Omar Javed, *vice president of investor relations*, **Hydro One**

Eliza Riego, *head, product and service innovation*, **TMX Group**

Malcolm Ryerse, *head of stewardship, responsible investment and senior portfolio manager*, **Columbia Threadneedle Investments**

Ben Ashwell, *editor*, **IR Magazine and Corporate Secretary**

6.00 pm

End of forum & closing remarks

Ben Ashwell, *editor*, **IR Magazine and Corporate Secretary**

PARTNERS

FORUM PARTNERS

corbin

Irwin

LH LAUREL HILL

OTC Markets

Q4

THE GLOBE AND MAIL

TMX THE FUTURE IS YOUNG TO SEE.