# IR MAGAZINE FORUM - CANADA

Wednesday, April 5, 2023 Toronto

## The role of IR on the road to recovery

More than three years have passed since the WHO declared Covid-19 a global pandemic. In Canada and abroad we saw the conversation shift from managing the pandemic itself to managing its economic aftershock. Finally, despite lingering market uncertainty, the conversation is starting to shift towards recovery and growth, and the role IR plays in driving that is crucial.

That's why we're bringing together Canada's IR community to share advice on how you can cut through the current uncertainty, communicate long term strategy to investors and support your company's growth in 2023 and beyond.

8.30 am **Registration, breakfast and morning networking**

8.50 am **Welcome to the IR Magazine Forum – Canada**

*Laurie Havelock, editor-at-large, IR Magazine*

9.00 am **Setting the scene: Navigating new macroeconomic landscapes**

Last year was a difficult year for Canadian companies, with soaring inflation, high interest rates and a global energy crisis. This year, as the situation starts to stabilize, issuers and investors are looking for guidance on what is coming next.

To kick off the forum our panelists will discuss lessons learned from managing last year's volatility, why there is reason to be cautiously optimistic in 2023 and what all this means in practice for public companies.

- Market outlook: where is the Canadian economy going in 2023?
- Understand the impact of inflation, supply chain crises and energy scarcity on investor sentiment
- Learn how other companies are responding to current and expected market volatility
- Discuss the key drivers of growth on the road to recovery

*Moderator: Laurie Havelock, editor-at-large, IR Magazine*
*Leslie Preston, managing director, senior economist, TD*

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9.30 am **Communicating through the storm: Targeting and engagement in a volatile market**

The evolving economic situation has significantly impacted shareholder bases, and your 'target investor' may have changed. Here we'll be sharing practical advice on how to engage with an increasingly dynamic market, provide reassurance to your existing shareholders and adapt your approach with new investors.

- Ensure shareholder confidence during periods of economic uncertainty
- Fine tune your messaging to reflect evolving investor demands
- Accessing new sources of capital in a difficult market
- Understand which communication tools and technologies the industry prefers

*Moderator: Steve Wade, head of event content, IR Magazine*
*Scott Parsons, SVP, investor relations, Alamos Gold*
*Sherry Wendt, VP, investor relations, Cenovus Energy*
*David Whyte, CEO, Irwin*

10.15 am **Networking break and morning refreshments**

10.45 am **Environmental update: Responding to changing environmental priorities and 'ESG fatigue'**

The war in Ukraine and resulting energy crisis has had a huge impact on the conversation around environmental issues. Whilst some stakeholders worry it gets too much attention, others are pushing for increased regulations, transparency and action.

In this session our panellists will discuss how the landscape has changed and how best to communicate your company's environmental performance in an age of increasing 'ESG fatigue'.

- Where is ESG going? Understand how investors are thinking about ESG issues in 2023
- Set and communicate achievable net zero targets in line with global and market standards
- Prepare for new expectations and requirements around climate and biodiversity

*Moderator: Laurie Havelock, editor-at-large, IR Magazine*
*Janet Craig, founding partner, Endeavour IR*

*Valerie Durand, head of IR & corporate sustainability, Air Canada*
*Mihaela Stefanov, director of corporate social responsibility, Boralex*

11.30 am **Managing the new workforce: Communicating social impact in 2023**

'Social washing', like greenwashing, is a growing concern for investors. Unprecedented shifts in the labour market and the scramble for talent have emphasised the importance of communicating your social story effectively and - more importantly - ensuring these commitments are fulfilled.

- An update on human capital management trends: rising living costs, unemployment and DE&I
- Discuss how the shift to remote working has changed the conversation around employee wellbeing
- Learn what social data investors are asking for and what your peers are reporting

*Moderator: Laurence Taylor, senior conference producer, IR Magazine*
*Gordana Terkalas, SVP, head of human resources, Aecon*

12.00 pm **Roundtables: Exchange ideas with your peers in group discussions**

How the roundtables work:

- Choose any of the following topics –the power is in your hands!
- Join the relevant roundtable and discuss with your peers
- At the end of the session, hear a quick roundup from each table

Topics:

- Creating impactful investor events in 2023
- The impact of AI on investor relations
- Best practice IR with limited resources
- Modernizing your IR toolbox
- Growing your retail investor base

*Stephanie Amaimo, VP, investor relations, Fortis*
*Sylvie Harton, chief business strategy officer, Lumi*

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*Greg Secord, VP, investor relations, OpenText*
*Laurence Taylor, senior conference producer, IR Magazine*
*Steve Wade, head of event content, IR Magazine*

12.45 pm **Lunch**

1.45 pm **Back to the 'new normal': Getting the in-person vs virtual balance right**

We know by now that the shift to more remote working is here to stay - but to what extent? Companies are still figuring out the right balance between online and in-person engagement and how best to maximise both efficiency and authenticity.

- Discuss which aspects of hybrid IR are transitory and which are permanent
- Learn how other companies are balancing in-person and virtual meetings and responding to different stakeholder pressures
- Hear best practice case-studies of effective in-person & virtual engagement

*Moderator: Laurence Taylor, senior conference producer, IR Magazine*
*Michael Barrett, VP, investor relations and investments, Element Fleet Management*
*Omar Javed, VP, investor relations, Hydro One*
*Ben Riley, head of business development, Lumi*

2.30 pm **The evolution of IR talent: Preparing yourself and your team for the future of investor relations**

The role and perception of IR has evolved significantly over the last few years, with many IROs finding themselves increasingly involved in other sides of the business. Not only has the scope of IR broadened, but the expectations put on IROs to fulfil their core responsibilities have grown as well.

Here we explore what trend towards more diverse and adaptable talent means for the career prospects of IROs, the development of teams and the future of the profession as a whole.

- Learn how the expectations of IROs are changing as the fight for capital evolves
- Share career development advice on responding to new challenges and setting yourself up for success
- Understand how best to build, prepare and develop your IR team in 2023

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*Moderator: Yvette Lokker, president and CEO, CIRI*
*Maeghan Albiston, VP, capital markets, Canadian Pacific Railway*
*Dave Hughes, VP, investor relations, Imperial Oil*
*Quentin Weber, senior advisor, investor relations, WSP*

3.15 pm **Investor Q&A: Hear directly from investors on their priorities in 2023**

During this open Q&A session, our panel of investors will address any concerns and questions you may have about what to expect in 2023. This is your chance to engage directly with a range of investors on various topics, including:

- Opportunities and concerns for the buy side in the context of the post-pandemic recovery
- Learn which sectors and industries Canadian investors are focussing on in 2023
- Understand precisely what information investors are looking for, and how best to present it

*Moderator: Steve Wade, head of event content, IR Magazine*
*Marc Gagnon, VP, portfolio manager, Industrial Alliance Investment Management*
*Erin Greenfield, president and portfolio manager, Greenfield Investment Management*
*Andy Huynh, portfolio manager, public equities, Healthcare of Ontario Pension Plan*

4.00 pm **Closing remarks and end of conference**

*Laurence Taylor, senior conference producer, IR Magazine*