

IR MAGAZINE FORUM - CANADA

Thursday, April 4, 2024, Toronto

Engaging investors in a challenging market

8.00 am	Registration, breakfast and morning networking
8.50 am	Welcome to the IR Magazine Forum – Canada <i>Laurie Havelock, editor, IR Magazine</i>
9.00 am	Setting the scene: Navigating a challenging macroeconomic landscape After a difficult few years for Canadian companies, volatile conditions continue; soaring inflation, high interest rates and the global energy crisis remain top of mind. To begin our 2024 event, our panelists will discuss what is coming next for Canadian markets and how companies can best prepare themselves for the year ahead. <ul style="list-style-type: none">- Examine how upcoming elections, conflicts and an uncertain political landscape will impact markets and investor behaviors- Discuss the 'lessons learned' from 2023 and how to incorporate these into your IR strategy- Hear where the Canadian market is going in 2024 and what changing investor demands will accompany it- Learn how companies can place themselves most effectively for maximum growth in 2024 <i>Moderator: Laurie Havelock, editor, IR Magazine</i> <i>Roy MacDonald, vice president, investor relations, Loblaw Companies</i> <i>Robert McConnaughey, senior vice president, head of investor relations advisory and community impact, Corbin Advisors</i>
9.30 am	Beyond the buzzword: Making AI work for you Over the last year, AI has become a catch-all term for technological innovation. It's time in 2024 to go beyond the vagaries and drill down into what specifically AI tools are, which ones are out there and how they can help your IR team. In this session, our panelists will provide tangible advice and practical steps for you to take back to the office in order to begin your own AI journey with confidence. <ul style="list-style-type: none">- Learn about what AI tools are available now and how they can be utilized within the IR function- Hear what your peers are doing in the AI space and develop your own strategy for leveraging the same technologies

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	<ul style="list-style-type: none">- Discover quick wins with AI, learning how to think innovatively and independently to create prompts that work for you- Stay up to date on safety and privacy concerns and learn how to begin thinking about an AI policy for your IR team- Discuss how to get buy-in for AI integration throughout your entire company, from the C-suite downwards <p><i>Moderator: Laurie Havelock, editor, IR Magazine</i> <i>Kam Mangat, vice president, investor relations and corporate strategy, NEXE Innovations</i> <i>Chris Makuch, senior director, Notified</i></p>
10.15 am	Networking break and morning refreshments
11.00 am	<p>Understanding investors: Getting to grips with the retail shareholder</p> <p>For many IR teams, the puzzle of retail investor engagement is a challenging one. Largely ignored for decades by issuers and other investors, only in recent years has the power – and conversely, the problems – of retail investors come to the fore.</p> <p>In this session, our panelists will explore the difficulty in understanding retail investor needs, cultivating their financial knowledge and striking the right tone in investor communications.</p> <ul style="list-style-type: none">- Consider whether to, when to and how to directly target retail investors for your shareholder base- Assess the different profiles of retail vs traditional investors and identify how this should impact your communications and information sharing- Hear what approach industry leaders are taking to decide how much time and money should be dedicated to different communities of investors- Discuss how to access retail channels and the most effective methods of engagement <p><i>Moderator: Lauren McDonald, conference producer, IR Magazine</i> <i>Robin Boschman, director, investor relations and corporate communications, E3 Lithium</i> <i>Dan Rollins, senior vice president, corporate development and investor relations, Torex Gold Resources</i></p>
11.45 am	<p>Roundtables: Exchange ideas with your peers in group discussions</p> <p>How the roundtables work:</p> <ul style="list-style-type: none">- Choose any of the following topics –the power is in your hands!- Join the relevant roundtable and discuss with your peers

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	<ul style="list-style-type: none">- At the end of the session, hear a quick roundup from each table <p>Topics:</p> <ul style="list-style-type: none">- Navigating IR as a resources company- Building your shareholder activism playbook- Best practice for creating your corporate deck- Troubleshooting your AI strategy- Capital deployment and framing your message <p><i>Moderator: Steve Wade, head of content, IR Magazine</i> <i>Carrie Gillard, head of investor relations, Shopify</i> <i>Dirk Lever, vice president, capital markets, Parkland Corporation</i></p>
12.30 pm	Lunch
1.30 pm	<p>Best practice for shareholder targeting</p> <p>When it comes to shareholder targeting, companies are still figuring out how best to maximize both efficiency and budget as they identify, prioritize and engage the right potential investors.</p> <p>In this session, hear from industry leaders as they discuss the challenges and solutions amid shareholder targeting both domestically and internationally in 2024.</p> <ul style="list-style-type: none">- Learn how to approach identifying potential investors in international markets and how to navigate the varying regulatory demands- Discover how to create an investor prioritization 'hit list'- Discuss how to measure the success of your targeting efforts- Hear what kind of investor targeting tools can add the most value to your IR team- Consider how frequently your IR team should be planning NDRs and investor days <p><i>Moderator: Steve Wade, head of content, IR Magazine</i> <i>Jennifer McCaughey, director, investor relations, Calian Group</i> <i>Scott Parsons, senior vice president, investor relations, Alamos Gold</i> <i>John Vincic, president, Oakstrom Advisors</i></p>
2.15 pm	<p>The future of investor relations: How to develop yourself and your team for the changing IR landscape</p> <p>IR has undergone significant changes in the past few years, with IROs taking on more roles and responsibilities across the business. However, while the IR function has expanded, so too have the demands on IROs to deliver on their core tasks.</p>

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	<p>In this session, join our experts in discussing what the trend towards more versatile and flexible talent means for the career opportunities of IROs, the growth of teams and the evolution of the profession as a whole.</p> <ul style="list-style-type: none">- Discover how the changing capital market affects the expectations of IROs- Discuss the growth of 'dual roles' within the IR function and the pros and cons of this development- Get career development tips on how to overcome new obstacles and achieve your goals- Learn how to create, train and grow your IR team in 2023 <p><i>Moderator: Lauren McDonald, conference producer, IR Magazine</i> <i>Adam Borgatti, senior vice president, corporate development and investor relations, Aecon Group</i> <i>Janet Craig, vice president, investor relations, Maple Leaf Foods</i> <i>Christopher Deans, assistant vice president, investor relations, IGM Financial</i> <i>Nathalie Megann, president and chief executive officer, Canadian Investor Relations Institute (CIRI)</i></p>
3.00 pm	<p>ESG reporting and engagement: How to cope with new rules and evolving investor preferences</p> <p>With constant developments around the SEC rule proposal, the new Bill S-211 and the CSRD potentially impacting Canadian companies, IR teams need to prioritize modernising reporting practices in 2024.</p> <p>In this final panel of the day, our speakers will discuss getting to grips with existing and upcoming regulatory changes while also answering your questions on what investor expectations are around this crucial issue.</p> <ul style="list-style-type: none">- Learn what regulatory changes are coming down the line and how these could and should affect company strategy- Discuss changing shareholder expectations around ESG issues- Consider the decline in ESG fund flows and hear if experts believe the issue has been de-prioritized- Hear how to navigate sustainability reporting while setting achievable goals in line with industry expectations <p><i>Moderator: Steve Wade, head of content, IR Magazine</i> <i>Prabh Banga, vice president, sustainability, Aecon Group</i> <i>Meryem Baskoun, director, corporate sustainability communications and reporting, Air Canada</i> <i>Sylvie Harton, chief business strategy officer, Lumi Global</i></p>



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3.45 pm	Closing remarks and end of conference
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