



IR MAGAZINE THINK TANK EAST COAST

Exclusively for senior IR professionals
Thursday, May 23, 2024
TD Offices, 1 Vanderbilt Avenue, New York

UNIQUE FORMAT

Our unique think tank format lets you exchange practical advice on IR's most significant issues. **Short-and-sharp panel briefings** provide context on matters critical to investor relations, **followed by structured roundtable discussions** in a closed environment that allows you to **speak frankly and honestly** about your challenges and share best practices with other senior IR professionals.

Join us to hear from other IROs on how you can **cut through the current uncertainty**, communicate long-term stability and strategy to shareholders, and support your company's growth in 2024 and beyond. Please note: This event is *exclusively* for in-house IROs at listed companies.

AGENDA

This event is in person only. All times are in ET (Eastern Time)

8.30 am **Registration, refreshments and networking**

9.20 am **Welcome to the IR Magazine Think Tank**

Steven Wade, head of content, *IR Magazine*

9.25 am **Opening remarks**

Jana Zinn, head of corporate access, *TD Cowen, a division of TD Securities*

9.30 am **IR in uncertain economic and political times**

An estimated 49% of the global population will be heading to the voting booths in 2024, international conflict and geopolitical tensions are impacting markets and businesses, and the global economy remains uncertain.

These global events impact businesses, their operations, and domestic and international investors.

Although IR can't alter the external environment, in our opening session we explore how teams can respond to investor concerns around country, sector, or company risks and how to adapt to changes in investment flows.

Moderator: Steven Wade, head of content, *IR Magazine*

Amritha Kasturirangan, vice president, portfolio manager and research analyst, *Franklin Templeton*

Aimee Remey, vice president US, investor relations, *Entain*



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10.00 am **Artificial intelligence: Real-life use cases for IR**

Go beyond the theoretical in this IR-specific and enlightening session around using artificial intelligence as part of your investor relations program.

As corporations adopt more sophisticated, enterprise-level AI tools, and confidence grows around their ability to enhance efficiency in activities, we look at some real-life examples of how IR teams utilize this powerful technology to add value to their IR program.

Moderator: Lauren McDonald, conference producer, *IR Magazine*
Arin Grossbard, senior director of strategy, *Notified*
Matt Humphries, vice president, investor relations & global corporate communications, *Blackline*

10.30 am **Roundtables: How IR can adapt to emerging threats and opportunities**

11.15 am **Coffee break**

11.45 am **Earnings calls: Preparing management and analysts**

Earnings calls are a time when IR is thrust into the spotlight, and any mistakes are magnified in the eyes of management and the investment community. A great deal of attention to detail and forward planning is required to prepare management teams and manage expectations with analysts.

However, with economic uncertainty and wider spreads in consensus, it can become more difficult to predict how analyst expectations, questions and reactions to your results. This in turn makes it increasingly difficult to prepare management teams for the earnings call.

This session will examine some nuances to expect in the next earnings season, and how best to manage consensus and prepare management teams in the lead up to your announcement.

Moderator: Lauren McDonald, conference producer, *IR Magazine*
Ally DeVoe, senior manager, investor relations, *Boston Scientific Corporation*
Mark Loehr, CEO, *OpenExchange*
Keri Mattox, senior vice president, chief communications and administration officer, *Zimmer Biomet*
Giuseppe Montefinese, manager, contributor relations - U.S., *Visible Alpha, now a part of S&P Global*

12.25 pm **Maximizing your time with management: New approaches to roadshow planning and corporate access**



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Investor engagement has significantly changed over recent years due to trends related to hybrid working, business travel and event attendance. It is now more challenging to fill roadshow schedules and enhance management's time on the road.

This session discusses creative ways IR teams can adapt to a changing corporate access environment and facilitate quality in-person investor engagement.

*Moderator: Steven Wade, head of content, IR Magazine
Meg Dodge, vice president, investor relations and corporate communications, Rocket Pharma
Pravesh Khandelwal, vice president, head of investor relations, Embecta
Jana Zinn, head of corporate access, TD Cowen, a division of TD Securities*

12.55 pm Roundtables: Improving investor engagement

1.30 pm Lunch

2.30 pm Scope 3, or not scope 3? What is happening with ESG reporting requirements

The global ESG regulatory landscape is constantly evolving, and regulations are becoming increasingly more complex and varied in their requirements.

The SEC Climate Disclosure Rule and Californian Climate Corporate Data Accountability Act will impact most US listed companies, and many North American corporations will be scoped into the European Commission's Corporate Sustainability Reporting Directive. This means that companies need to understand the data collection and disclosure requirements they are subject to, carry out a gap analysis and revamp their ESG story.

In this session, we analyze the global climate disclosure landscape, discuss the timeline and intricacies of the rules, approach to materiality, scope 3 reporting and assurance demands and together we share examples of how companies can adapt to evolving expectations of companies and their ESG disclosures.

*Moderator: Lauren McDonald, conference producer, IR Magazine
Prabh Banga, vice president of sustainability, Aecon Group
Shira Goldmann, senior manager, ESG, Verizon*

3.00 pm Q&A with investors and analysts: Get your questions answered!

In our final session, we ask the buy-side to share their perspectives on the investment outlook, priorities for management teams and how investor relations activities can improve.

In a much-loved format, the audience are invited to ask questions directly to investment analysts and portfolio managers to get constructive feedback and insight from one of IR's key stakeholders.



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Moderator: Steven Wade, head of content, *IR Magazine*
Rupal Bhansali, CEO, CIO and portfolio manager of international & global equity strategies,
Double Duty Money Management
Ellen Carr, principal and high yield bond portfolio manager, *Barksdale Investment Management*
Thaddeus Pollock, executive vice president, head of value equity, head of sustainable investing,
Mutual of America Capital Management

3.45 pm **Closing remarks, summary and action points**

Moderator: Steven Wade, head of content, *IR Magazine*

4.00 pm **Drinks reception and networking**

4.45 pm **End of event**