

IR Magazine Forum – Europe 2021

Staying agile: The transformation of IR

Thursday, June 10, Virtual event

LIVE: 9 am – 4.30 pm CET

AGENDA

All times are in Central European Time (CET)

8.00 am **Platform opens: Networking with attendees**

8.50 am **Welcome to the IR Magazine Forum – Europe 2021**

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

9.00 am **Capital markets trends to be aware of in 2022**

As we move towards economic recovery, mid-year is a crucial time to assess the biggest trends which will lead into 2022. This big-picture session will give sell-side perspectives on the current prospects for European stocks, capital markets megatrends and how European investment opportunities are evolving. We will discuss:

- Do investors seem bullish or bearish on European stocks?
- Where are some opportunities for alpha over the coming months?

Sebastian Raedler, head of European equity strategy, **Bank of America**

Mark Troman, deputy head of EMEA equity research, **Bank of America**

9.30 am **Fireside chat: How marketing calendars are evolving and what lies ahead for IR meetings**

IR teams have done a brilliant job at shifting to virtual investor meetings, but how issuers will deliver their equity story is changing. This session will provide advice on how to approach specific investor touch-points. Attendees will:

- Get data-driven insight into how IR teams are approaching their investor engagement this year
- Hear specific advice on how to make the most out of NDRs, Conferences, AGMs, Capital Market Days and Earnings calls
- Discuss how can you turn virtual meeting data into actions

Ben Burnside, managing director, head of EMEA, **OpenExchange**

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

10.00 am **Designing the IR engagement calendar in practical terms: How to stay agile**

The future of restriction-free travel soon promises a return to normality, but to what extent will easing of restrictions be fragmented across Europe, and what will the impact be on IR? In this session you will learn:

- How IR can establish a flexible marketing approach over the coming months and be prepared to pivot at short notice.
- How hybrid will work for your non-deal roadshows, investor conferences, 1:1 meetings and earnings calls.
- How to measure the ongoing success of your approach and make the most out of management's time.

Carlos Berastain, group VP, director of IR and market intelligence, **Grupo Santander**

Lorna Davie, director of IR, **Credit Suisse**

Michael Hufton, founder and managing director, **ingage**

Nadeem Khan, VP sales, EMEA, **PGI**

Marc Koebernick, head of IR, **Siemens Healthineers**

Moderator: Tim Human, senior reporter, **IR Magazine**

11.00 am **Networking break**

11.15 am **What does IR look like in 2025 and how will the pandemic affect the future of the role?**

It is debated that the pandemic has fundamentally changed the IR ecosystem, required skillset and responsibilities. This session will engage with this debate and discuss the transformation of the investor relations role, and the recent and long-term factors contributing to this shift. Heads of IR and CEOs in this session will give their ideas on:

- The skillset needed to run a strong IR program in the next 10 years, and what management teams and boards will be expecting of IR teams in 2030.
- The emerging factors contributing to the shift in the IR role.
- How IROs and their teams are currently creating the most value for their teams.

Sonya Ghobrial, head of IR, **GlaxoSmithKline**

Chris Hollis, director of financial communications, **LVMH**

Gerbrand Nijman, CEO, **Global Telecom**

Richard O'Connor, global head of IR, **HSBC**

Amit Sanghvi, managing director and VP, client experience, **Q4**

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

12.15 pm **International exposure: How to access a global shareholder base**

This session explores the challenges and opportunities of increasing investor targeting internationally, using the latest digital marketing techniques. This session will address:

- How issuers have successfully told their equity story and reached new international investors during the last 12 months
- How investor targeting practices are evolving and the best ways and tools to maximize outreach digitally
- New regulations impacting European issuers and their international investors

Jonathan Dickson, VP, international corporate services, [OTC Markets Group](#)

Patrick Kofler, head of IR, [Zalando](#)

Phoebe Loh, senior director, global IR, [Qiagen](#)

Gervais Williams, head of equities, [Premier Miton Investors](#)

Moderator: Tim Human, senior reporter, [IR Magazine](#)

1.00 pm **The road to ESEF: Challenges and lessons learned from 2020**

More than 170 European issuers responded to our survey "The road to ESEF - over the finish line" and in this presentation you will get valuable insights into the what, how and when of ESEF. The survey was a collaboration between CtrlPrint and Amana Consulting that together had more 600 clients using their ESEF tools.

Karl Magnus Westerberg, product and marketing, [CtrlPrint](#)

1.30 pm **Roundtable discussion: Effective IR – How to stay agile in your role**

In this interactive session, attendees can take part in a live discussion on the how IR can react to the ongoing transformation, changing skillset and recent challenges of the IR function. For practical takeaways from other IR teams and to have your questions answered, join in with video and audio and add your voice to the discussions.

Moderator: Laurie Havelock, editor-at-large, [IR Magazine](#)

2.00 pm **Looking ahead: How will data transform IR?**

To help IR teams navigate the emergence of AI and smart technologies used by investors and, increasingly; issuers, this session will cover:

- The sources of emerging data that companies should be aware of.
- How the emerging use of natural language processing and machine learning impacts IR teams, and how IR can take control of their existing data.
- How the buy-side currently harnesses these technologies, and the impact it has on investment decisions.

Wladimir Charvat, head of investor engagement, [Praexo](#)

Victor Drozdov, director, business communications and IR, [Polyus](#)

Veronika Kryachko, head of IR, [Magnitogorsk Iron & Steel Works \(MMK\)](#)

Moderator: Tim Human, senior reporter, [IR Magazine](#)

2.30 pm **Decoding ESG reporting frameworks: An issuer and buy-side comparison**

When it comes to ESG reporting, companies may feel overwhelmed when deciding which framework to prioritize. With independent and paid-for frameworks

emerging, the challenge becomes even more fragmented. In this session, you will discover:

- How a number of issuers and investors have experienced the various reporting frameworks and initiatives.
- Which frameworks to consider when trying to improve your ESG rating and inclusion in indices.
- Investor experiences and preferences on dominant and emerging frameworks.

Ramón Álvarez-Pedrosa, head of IR, **Repsol**

Yulia Chekunaeva, director, capital markets and strategic initiatives, **En+Group**

Randeep Somel, portfolio manager, **M&G**

Martin Ziegenbalg, EVP, head of IR, **Deutsche Post DHL**

Moderator: Tim Human, senior reporter, **IR Magazine**

3.30 pm

ESG cooperation: Should IR be listeners or teachers on ESG? Working with the buy-side and the key role of IR

This session will bring in buy-side perspectives to discuss how issuers and investors can better cooperate for a more effective ESG approach. As well as this, we will discuss how IROs can hone in on their operational handling of ESG, from board communications to improving the skillset required to implement an ESG program. We will discuss:

- What are some ideal ESG communications best practices from the investor perspective?
- How can IR and the buy-side better cooperate to avoid greenwashing?
- The internal process of managing an ESG program: how can IR communicate the initiative to the board? What should the main responsibility of investor relations be in managing an ESG program?

Monica Girardi, head of group IR, **Enel**

Tjerk Huysinga, EVP, head of IR, **Shell**

Panos Seretis, head of EMEA ESG research, **Bank of America**

Eugenia Unanyants-Jackson, principal, head of ESG research, **PGIM**

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

4.30 pm

Closing remarks and end of forum

