



IR MAGAZINE THINK TANK – EUROPE

Exclusively for senior IR professionals

Thursday, June 20, 2024, Bank of America offices, London

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 communicate **long-term stability and strategy to shareholders** and support your company's growth. Please note: This event is *exclusively* for in-house IROs at listed companies.

AGENDA

This event is in person only.

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

8.50 am **Welcome to the think tank**

Laurie Havelock, editor, IR Magazine

8.55 am **Opening remarks**

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

9.00 am **Navigating the equity downturn: Shareholder engagement best practices in 2024**

With UK equities out of favor and a generally sluggish outlook pervading capital markets across Europe, IR professionals face an uphill struggle when attracting, engaging and communicating with shareholders.

This panel will explore practical strategies and best practice for IR teams to adapt their approach and plot a course through this challenging period.

- Discover how your peers are identifying and engaging potential investors within a turbulent landscape
- Learn how to diversity targeting efforts to reach new investor pools, both domestically and internationally
- Hear how to foster transparent, proactive, and empathetic communication during periods of market volatility



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- Understand how changing stock-flow dynamics can help you anticipate shifts in your shareholder base and tailor your engagement strategies accordingly

Moderator: Laurie Havelock, editor, *IR Magazine*

Geoff Callow, head of IR, *Ecora Resources*

Evelyn Herrmann, managing director and Europe economist, *Bank of America*

Martin Railton, head of advisory EMEA, *S&P Global Market Intelligence*

9.30 am **Tech-Forward IR: Harnessing innovation for impactful investor engagement**

In today's fast-paced and digitally-driven investment landscape, IR teams must always be on the lookout for tools that can streamline and simplify their basic functions. Yet, when it comes to leveraging the latest technological advancements, it can be challenging to work out what options are out there and how they can work for you.

In this panel, our expert speaker will discuss the transformative power of advanced tech with a particular focus on optimizing investor days, capital market days and virtual shareholder events.

- Learn how to leverage AI-powered analytics to gather real-time insights on investor behavior, sentiment and engagement during events, enabling more personalized and impactful content delivery
- Explore new tools that can create immersive and interactive experiences for remote and hybrid investor audiences
- Discover how to automate administrative tasks and free up your time to focus on strategic priorities and building investor relationships

Moderator: Laurie Havelock, editor, *IR Magazine*

France de Sury, head of IR, *Groupe BPCE*

Darrell Heaps, founder and CEO, *Q4*

Isabel Vilela, head of investor relations and corporate communications, *GoviEx Uranium*

10.00 am **Modernizing your investor day: Building a must-attend event**

Investor days are evolving rapidly, with changing formats, higher production values, and greater integration of technology. But how can you ensure your next investor day attracts and resonates with the right audience?

In this session, our panel of IR experts will provide a comprehensive look at planning and executing a best-in-class investor day:

- Explore strategic approaches to maximising attendance



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- Learn how to select the ideal format - in-person, virtual or hybrid - based on your objectives and audience
- Gain insight into creative ways to elevate the experience through immersive formats, multimedia integration, and engagement tactics
- Get tips on how to measure the effectiveness of your event

Moderator: Lauren McDonald, conference producer, *IR Magazine*

Sebastian Grabert, director of investor relations and corporate finance, *HomeToGo*

Sylvie Harton, chief business strategy officer, *Lumi Global*

10.30 am Roundtables

11.00 am Morning networking break

11.30 am Bridging the IR skills gap: Navigating change and evolving competencies

The IR world is constantly evolving and with it, the role of the IRO. Driven by technological advancements, evolving regulatory requirements and changing investor needs, IR teams must be vigilant as to what skills and expectations are imperative to have not only now, but further down the line.

This panel will explore the key competencies and skill sets required for IR professionals to thrive in the modern IR ecosystem, with a focus on addressing the skills gap and on practical strategies for continuous development.

- Hear about the impact of new market conditions and incoming regulatory changes on evolving skill sets for “the IRO of the future”
- Learn how to leverage training programs, mentorship and cross-functional collaboration to bridge the skills gap
- Discover how to take ownership of your career development and stay ahead of the curve

Moderator: Noemi Distefano, reporter, *IR Magazine*

Marina Calero, former group head of IR and ESG, *Hyve Group*

Jane Henderson, investor relations manager, *BAT*

12.00 pm ESG - Regulatory shifts, investor expectations, and effective narrative-building

As the ESG landscape continues to evolve, IR teams are faced with the challenge of navigating a complex web of regulatory requirements, reporting frameworks and investor expectations. Across Europe, companies are grappling with new disclosure mandates, such as the EU Sustainable



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Finance Disclosure Regulation (SFDR) and the Corporate Sustainability Reporting Directive (CSRD), each with its own unique set of guidelines and metrics.

This panel will provide IR teams with the essential insights and practical guidance to effectively synthesize the most relevant ESG data and communicate a compelling and concise narrative to investors.

- Identify the most material ESG metrics and indicators that are relevant to your business and investors
- Explore emerging ESG-related trends and themes that are shaping investor sentiment and decision-making
- Learn techniques for distilling complex ESG data and information into clear, concise and impactful communications
- Explore methods for aligning internal stakeholders to ensure consistency in ESG-related communications

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

Federico Rubin, investor relations analyst, *Pirelli & C*

Panos Seretis, managing director and head of global sustainability research, *Bank of America*

Rodolfo Svara, investor and ESG relations officer, *Assicurazioni Generali*

12.30 pm Elevating the strategic impact of investor relations: Forging a powerful partnership with the C-Suite

In a public company, the C-suite must find the balance between multiple competing priorities to ensure they are always driving shareholder value. A symbiotic relationship with the IR team is critical to this project and a shared understanding of company strategy central to its success.

In this session, you will:

- Gain insights into how the C-suite defines and measures the success of a high-performing investor relations function
- Discover practical approaches for fostering a collaborative partnership between the IR team and the C-suite that allows for constructive discussion of management's strengths and weaknesses
- Understand the strategic considerations for expanding the IR department against a backdrop of resource constraints
- Learn effective strategies for investor relations professionals to assert their vital role within the organization
- Discuss the best methods to keep management informed of investor sentiment

Moderator: Lauren McDonald, conference producer, *IR Magazine*



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Michael Hufton, founder and managing director, *ingage*

Christian Kern, director of IR, *Telefónica Deutschland*

Irina Zhurba, head of IR and sustainability reporting, *Mister Spex*

1.00 pm Roundtables

1.30 pm Lunch

2.30 pm Unlocking the secrets of your stock's trading dynamics: Strategies for success

As an investor relations professional, having a comprehensive understanding of how your company's stock is traded is paramount to driving effective shareholder engagement and optimizing your overall IR strategy. Far beyond just the transparency concerns raised by the proliferation of dark pool trading venues, the intricate web of trading mechanisms, market participants, and stock flow patterns can have a profound impact on the perception and valuation of your organization.

This panel will provide IR teams with a deep dive into the complex trading landscape, equipping you with the knowledge and tools to unravel the mysteries surrounding the trading of your company's shares.

- Gain a thorough understanding of the diverse trading venues and market participants involved in the trading of your stock, from traditional exchanges to alternative liquidity pools
- Learn how to track and interpret the movement of your company's shares, identifying key shifts in ownership to understand who is trading your stock and why
- Uncover the tools and analytical frameworks that you can employ to gain deeper insights into your investor base to make more informed, data-driven decisions around engagement
- Discuss how to navigate transparency issues in your shareholder base when trying to understand the full picture of your company's trading landscape

Moderator: Lauren McDonald, conference producer, *IR Magazine*

Gabriel Gonzalez-Gutierrez, investor relations and ESG manager, *Rolls Royce*

Neddy Yahya, senior cash trader, *Bank of America*



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3.00 pm **Cutting through the noise: Maintaining messaging consistency amid data overload**

With ever-evolving disclosure requirements, crowded capital markets and constantly changing investor expectations, IR teams face a sizeable challenge in getting their message across to target audiences.

In this panel, our speakers will discuss how to navigate the data overload and ensure IR teams are communicating their narrative in a clear, concise and resonant manner.

- Learn how to develop a cohesive messaging framework to align internal stakeholders and ensure consistency across all investor touchpoints
- Discuss how to prioritize and distill the most relevant data for your communications
- Hear how to strategically adapt messaging to address evolving regulatory requirements and investor information preferences
- Discover the most effective digital channels and content platforms for different audiences and how to strategically utilize each one
- Consider how to align IR and corporate communications for greater consistency and resource maximization

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

Erik Carlson, COO, *Notified*

Simon McGough, president, IR, *Wood Group*

Sandra Novakov, managing director of investor relations, *Morrow Sodali*

3.30 pm **Investor Q&A: Ask the buy-side**

In this interactive Q&A session, we've assembled an expert panel of investors to provide you with an inside look at their priorities, concerns, and areas of focus for the year ahead. This is your opportunity to engage directly with a diverse range of buy-side perspectives and gain valuable insights to enhance your investor relations strategies.

- Hear an investor perspective on the current market environment, areas of opportunity, and potential risks that are shaping their decision-making processes
- Learn what buy-side expectations are when it comes to interacting with IR teams
- Uncover the critical factors that influence investor perceptions, including the information they value most and the potential deal-breakers that can impact their investment decisions

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

Eloise Veillet, portfolio manager, formerly *Redwheel International*

Gervais Williams, head of equities, *Premier Miton Investors*



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4.15 pm **Closing remarks and end of think tank**

Steven Wade, head of event content, *IR Magazine*