



# IR MAGAZINE THINK TANK – EUROPE

Exclusively for senior IR professionals  
Thursday, June 22, 2023, 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 into 2024. 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**

Steven Wade, head of event content, IR Magazine

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

**9.00 am**     **IR in a 'poly-crisis': Respond to converging macro challenges**

Supply chain disruptions, volatile markets and geopolitical tensions each constitute a significant challenge for IR. Together, they are what some have dubbed a 'poly-crisis': a complex mix of challenges greater than the sum of its parts. But a poly-crisis is also a 'poly-opportunity'.

This panel will discuss how IR teams can communicate resilience in uncharted territory and drive value in rapidly changing markets.

- Clarify and respond to increasing market uncertainty
- Navigate evolving supply chain and geopolitical tensions
- Reasons to be optimistic: Key drivers of growth on the road to recovery

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

Amit Bhalla, SVP head of investor relations, Schneider Electric

Joanna Darlington, partner, FGS Global

Ruben Segura-Cayuella, head of Europe economics, Bank of America

**9.30 am**     **Fire-side chat: ESG oversight and activism prevention**

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Companies are increasingly being held to account by their shareholders. A growth in pass-through voting and the growing influence of proxy advisory firms mean that boards, management, and IR teams must deepen their relationship with investor stewardship teams.

ESG issues increasingly feature in European activist campaigns, often alongside themes such as governance matters, potential M&A transactions and other efforts to increase shareholder returns. This session will explore the steps IR teams can take to enhance ESG oversight, prepare for the next AGM and prevent ESG-related activism.

- Understand the trends as it relates to investor stewardship and ESG activism
- Learn how to apply ESG best practices and optimize governance
- Hear how IR should communicate to the board about ESG and climate targets

Moderator: Hemma Visavadia, reporter, IR Magazine  
Jana Jevcakova, managing director and head of ESG International, Morrow Sodali

## 9.50 am **New ESG priorities: Regulations, reporting and reality**

Interest in ESG is at an all-time high. This year the CSRD entered into force, the ISSB is releasing the first of its standards, and the TNFD is launching its final framework. However, many on the buy side still feel there is a disconnect between targets and action and between good storytelling and robust data. Here we discuss how to:

- Prepare for new acronyms: How are standards evolving and aligning?
- Go from targets to action: Investor expectations around transition plans
- Communicate ESG information authentically in an age of increasing ESG fatigue

Moderator: Tim Human, senior reporter, IR Magazine  
Simon Gittings, head of IR and corporate communications, Investis Digital  
Sophie Platts, group head of sustainability, Entain  
Panos Seretis, head of global ESG research, Bank of America

## 10.30 am **Roundtables: Communicate long-term resilience to shareholders**

## 11.00 am **Morning networking break**

## 11.30 am **Identifying and targeting investors in uncertain times**

As markets and the fight for capital evolves, IROs must find effective and creative ways to identify and target investors.



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Here we'll be sharing advice on how to engage with an increasingly dynamic market, fine-tune your company story, leverage new technologies to maximize the efficiency of your outreach and communicate with a wide range of investors.

- Access new sources of capital as the market and shareholder bases evolve
- Communicate growth and revenue loss to buy-side and sell-side analysts
- Understand different approaches to targeting investors in a range of geographies

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

Tish Crawford-Jones, director of IR, Q4

Mia Nordlander, SVP, investor relations, Kambi

Sarah Spray, head of investor relations, Maersk

## 12.00 pm Fireside chat: Growing and strengthening your retail shareholder base

The last three years has seen a real shift in regulatory support and policy around broader retail investor and stakeholder inclusion. In this fire-side chat we'll be looking at the implications of this on IR teams and how best to target and maintain your retail shareholder base.

- Understand the changing relationship between public companies and retail shareholders as markets evolve
- Discuss the benefits and burden of increasing retail ownership and advice on managing this balance
- Learn specific examples of effective retail engagement strategies

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

James Deal, co-founder and head of UK, PrimaryBid

## 12.20 pm The 'new normal': Shareholder engagement and re-engagement in a hybrid world

More than three years have passed since Covid-19 was declared a global pandemic, and companies are still figuring out the right balance between in-person and virtual meetings.

But how has the conversation changed? Which companies are leading the way when it comes to hybrid engagement, and what new tools and technologies enable IROs to connect better with their shareholders?

- Learn how other IR teams are rethinking their virtual/in-person balance
- Understand different geographical expectations around direct and indirect engagement
- Best-in-class roadshows, capital markets days and other events in a hybrid world

Moderator: Laurence Taylor, senior conference producer, IR Magazine

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Ben Riley, head of business development, Lumi  
Müge Yücel, director of IR and sustainability, Galata Wind

**12.50 pm Roundtables: Targeting and engagement best practices**

**1.15 pm Lunch**

**2.15 pm Leveraging new technology to enhance your IR program**

There is debate over the impact tools like ChatGPT will have on investor relations. Still, there is no doubt that automation and AI are transforming multiple industries and presenting entirely new risks and opportunities for IROs.

In this panel, we will discuss the key trends in automation and AI that IROs should be watching out for and share advice on how to effectively use (and not use) these technologies to enhance your IR program.

- An overview of the biggest technological trends impacting IROs today
- Debate the risks, opportunities and limitations of automation and AI in IR
- Case studies: Effective application of automation and AI to enhance productivity

Moderator: Lauren McDonald, conference producer, IR Magazine  
Erik Carlson, COO and CFO, Notified  
Irina Logutenkova, head of IR, Getech

**2.45 pm The evolution of IR talent: Setting yourself and your team up for success**

The role and perception of IR have evolved significantly over the last few years, with many IROs becoming increasingly involved in other sides of the business and taking on more responsibilities.

Here we explore what the 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.

- Understand and respond to changing management expectations of IROs
- Share career development strategies to future-proof your IR team
- After IR: Learn the next steps for IROs looking to move into managerial roles

Moderator: Lauren McDonald, conference producer, IR Magazine  
Thomas Kudsk Larsen, former SVP head of communication and investor relations, Sobi

**3.05 pm Roundtables: Tips on upskilling and modernizing your IR team**



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## **3.35 pm** Investor Q&A: Understand investor priorities in 2023 and beyond

During this open Q&A session, our panel of investors will address any concerns and questions 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 market uncertainty
- Learn which sectors and industries European investors are focusing on in 2023
- Understand investors' red and green flags when it comes to engaging with IROs

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

Camilla Ayling, portfolio manager, active equities, Legal & General Investment Management

Heinrich Ey, director and co-CIO, European small and mid-caps, Allianz Global Investors

Jonas Hoersch, portfolio manager, Walleye Capital

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

Steven Wade, head of event content, IR Magazine