IR magazine

Global IR Forum

Global best practice, regional outlook and sector-specific discussions

October 6 - 8, 2020 | Online

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Agenda

All times below are in UTC

Day 1 | Day 2 | Day 3

Day 1: Tuesday, October 6

7.00 am	**Spotlight on Asia Pacific: Outlook for markets and investor relations** This session will examine how regional and international investors are interpreting political risk and trade tensions in the Asia Pacific markets and how IR teams can capitalize on the reduced need for in-person roadshows. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Jessica Jook, Chief strategy officer and vice president for group investor relations, Canvest Environmental Protection Group** **Simon Weston, Fund manager, Axa Investment Management**
8.00 am	**Networking break**
8.30am	**IR in Technology, Media and Telecoms: Educating generalist investors and demonstrating your human capital efforts** The global pandemic and subsequent government advice has accelerated many of the trends in accelerating growth in TMT. As a result, there has been an increase of generalist investors in the space and IR teams need to adapt their messaging accordingly. This is happening at a time when human capital, a key asset for technology firms, is gaining focus from society and investors alike. This session will discuss the necessary changes IROs should make in their investor engagement, messaging and ESG reporting as a result. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Inger Folkeson, Chief financial officer, Digi**
9.15 am	**IR in the industrials sector: Storytelling, Sustainability & Supply chains** With the Covid-19-driven economic slowdown, many industrials firms will be adversely affected by halted activities and lower commercial usage. Regain comfort in the industry by learning how to communicate around supply chain resilience and operational risk, and understand how the influx of passive investors in the sector impacts your IR and ESG program. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine***
10.00 am	***Expo break***
11.00 am	**Spotlight on EMEA: Outlook for markets and investor relations**

	This session aims to provide insight into the speed and magnitude of the recession and consequent recovery, specifically looking at how interest rates impact debt and equity markets and the issues impacting fund flows in the EMEA region. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine***
12.00 Noon	**Networking break**
12.30 pm	**IR in the consumer cyclical sector: Adapting messaging for a cyclical investor base** Discuss how to balance the long-term and short-term dynamics in your messaging to attract value investors but maintain trust with growth and GARP investors. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Kristin Kohler, Global head of investor relations, Dufry**
1.15 pm	**IR in the utilities sector: How to shape your debt and equity IR programs moving forward** As a defensive sector, the utilities session will look at the potential impact today's government lending and spending will have on the sector in subsequent years. We will also discuss how current interest rates can impact your debt IR program and how IR teams should be communicating around capital allocation with their equity investors. **Moderator: Ben Ashwell, editor, *IR Magazine***
2.00 pm	***Expo break***
3.00 pm	**Spotlight on the Americas: Outlook for markets and investor relations** In this session, which examines the key points for investor relations and capital markets in the Americas we examine the impact that the US election is likely to have on the region and discuss the future of equity markets given the rise of alternative sources of funding for companies. **Moderator: Ben Ashwell, editor, *IR Magazine***
4.00 pm	***Networking break***
4.30 pm	**IR in the financial sector: Social responsibility and shareholder requirements after the pandemic** Understand the buyside's concerns and perspective on the sector and how to communicate with your shareholders during tough times. At a time when financial services firms need to find the delicate balance between financial health and shareholder returns we look at how IR teams can manage expectations with their shareholders and broaden their investor base by engaging and reporting around material ESG issues in the finance sector. **Moderator: Ben Ashwell, editor, *IR Magazine***

	Brooke Carillo, Head of strategy and investor relations, Annaly **Chad Reed, Head of investor relations, Hannon Armstrong**
5.15 pm	**IR in the healthcare sector: Build credibility and understand how healthcare policies will impact IR** The global pandemic has had a significant impact on health policies and the healthcare sector globally. During this session we look at what IR can do to build management's credibility with investors at a time of increased interest. We examine how IR teams can help onboard new investors that may need bringing up to speed on the scientific details of the businesses and examine what lies ahead for M&A activity in the sector. **Moderator: Ben Ashwell, editor, *IR Magazine*** **Myesha Lacy, Vice president of investor relations and corporate communication, Adverum**

Day 1 | Day 2 | Day 3

Day 2: Wednesday, October 7

7.00 am	**Rethinking IR budgets: Re-assign or reduce?** The reduction in travel has saved many companies a large proportion of their IR budget, but there is still pressure on companies to look for efficiencies in how they operate. Join the debate around how IR budgets should look in the short and medium-term, and which areas need to be prioritized. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Saravanan Desigamanie, Head of strategy and communications, Malakoff** **David Nicol, Executive vice president and chief financial officer, Metro Pacific Investments**
8.00 am	**Networking break**
8.30 am	**[Interactive session] Remote working and reporting in 2020: How to pandemic-proof your reporting processes** Social distancing policies have disrupted how we collaborate, communicate and how we report. If the work-from-home trend continues throughout the next reporting cycles, changes need to be made to your processes to maintain quality reporting. Join this interactive session to share views and opinions on: • Your top reporting challenges resulting from remote working and the pandemic • How to collaborate around reporting, while ensuring the security of information while your teams are separated • Protecting your team's mental health with the intense workload during the reporting period
9.15 am	**Covid-19 and climate: Balancing long and short-term factors in your ESG program** The pandemic has bought into focus social and human capital however climate action is still a big factor for investor engagement and decision making. In this session we discuss how to balance the shorter-term ESG challenges with the long-term risks. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine***
10.00 am	***Session break***
11.00 am	**How will Mifid II and Covid-19 change the nature of corporate access?** Mifid II focused attentions on the cost of corporate access and Covid-19 opened eyes to the expanded reach of virtual meetings, but how will access to management evolve? During this session we look at how to manage investors' increased expectation around the availability of management and examine how to improve engagement during virtual group meetings. Finally, this session will provide advice on how to start new relationships over a virtual setting at a time when investor bases are in flux.

	Moderator: Wim Allegaert, Chair, BelIR **Victor Drozdov, Director of business communications and investor relations, Polyus** **Patrick Kofler, Head of investor relations, Zalando**
12.00 Noon	**Networking break**
12.30 pm	**IR in the finance sector: Social responsibility and shareholder requirements after the pandemic** Understand the buyside's concerns and perspective on the sector and how to communicate with your shareholders during tough times. At a time when financial services firms need to find the delicate balance between financial health and shareholder returns, we look at how IR teams can manage expectations with their shareholders and broaden their investor base by engaging and reporting around material ESG issues in the finance sector. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Richard O'Connor, Global head of investor relations, HSBC** **Rob Gurner, Head of investor relations, Plus500**
1.15 pm	**IR in the consumer non-cyclical sector: Managing short-horizon investors and showcasing the tangible digitally** Discuss the best way to showcase tangible products and operations for investors in a virtual setting. Learn how the accelerated shift to e-commerce and changes in consumer behavior have changed investor thinking on consumer staples and what IR can do to manage an increased focus in the sector from short-horizon investors. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Phil Terpolilli, Director of investor relations, Presitge consumer healthcare**
2.00 pm	***Session break***
3.00 pm	**What's the best way to engage new investors?** Targeting is significantly more crucial and difficult during periods of disruption, both to markets and the IR meeting schedule. During this session we examine the best ways to build new relationships remotely. We will specifically advise on the best ways to use alternative methods of engaging with investors and how to change your messaging and approach in a bid to enhance visibility. **Moderator: Ben Ashwell, editor, *IR Magazine*** **Michael Becker, Executive vice president of strategic partnerships and initiatives, Business Wire**

4.00 pm	***Networking break***
4.30 pm	**IR in Technology, Media and Telecoms: Educating generalist investors and demonstrating your human capital efforts** The global pandemic and subsequent government advice has accelerated many of the trends in accelerating growth in TMT. As a result, there has been an increase of generalist investors in the space and IR teams need to adapt their messaging accordingly. This is happening at a time when human capital, a key asset for technology firms, is gaining focus from society and investors alike. This session will discuss the necessary changes IROs should make in their investor engagement, messaging and ESG reporting as a result. **Moderator: Ben Ashwell, editor, *IR Magazine*** **Lucy Rutishauser, Executive vice president and chief financial officer, Sinclair Broadcast Group**
5.15 pm	**IR in the energy sector: Is Covid-19 the catalyst for accelerating the energy transition?** As demand for commodities and export demand effects energy companies globally, energy stocks are in a potentially volatile state. Discuss the impact that the recent oil price drop will have on the sector, and how Covid-19 will impact the energy transition and longevity of traditional energy. Discover how IR teams can create better liquidity and improve their access to capital at this lower point in the cycle. **Moderator: Ben Ashwell, editor, *IR Magazine*** **Sean Brown, Chief financial officer, Gibson Energy**

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Day 3: Thursday, October 8

7.00 am	**Active vs. passive in the coronavirus context** Will Covid-19 result in a snap-back to active management, or will the trend to passive continue? During this session we debate the impact that Covid-19 has had on market structure and the future of passive investing. We will also explore how IR can manage their passive investor base going forward, including looking at the governance efforts as passive investors apply more pressure on ESG and what IR teams can do if they are suddenly included or excluded from an index. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine***
8.00 am	**Networking break**
8.30 am	**IR in the consumer non-cyclical sector: Managing short-horizon investors and showcasing the tangible digitally** Discuss the best way to showcase tangible products and operations for investors in a virtual setting. Learn how the accelerated shift to e-commerce and changes in consumer behavior have changed investor thinking on consumer staples and what IR can do to manage an increased focus in the sector from short-horizon investors. **Laurie Havelock, editor-at-large, *IR Magazine*** **David Akers, Head of investor relations, The a2 Milk Company**
9.15 am	**IR in the financial sector: Social responsibility and shareholder requirements after the pandemic** Understand the buyside's concerns and perspective on the sector and how to communicate with your shareholders during tough times. At a time when financial services firms need to find the delicate balance between financial health and shareholder returns, we look at how IR teams can manage expectations with their shareholders and broaden their investor base by engaging and reporting around material ESG issues in the finance sector. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Walid Mourad, Director portfolio manager and analyst, Lazard Gulf**
10.00 am	***Session break***
11.00 am	**How to meet and manage investor expectations**

	The lack of guidance is creating larger spread across analysts' consensus yet providing guidance without certainty causes its own problems. Join us to understand when and how companies should re-instate guidance, what the market conditions need to be to ensure that it's accurate and learn how to decide how much information you should provide to the market when the external environment is rapidly changing. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Lorenzo Crispoltoni, Head of equity and alternative investments, Fideuram intesa sanpaolo**
12.00 Noon	**Networking break**
12.30 pm	**IR in the industrials sector: Storytelling, sustainability and supply chains** With the Covid-19-driven economic slowdown, many industrials firms will be adversely affected by halted activities and lower commercial usage. Regain comfort in the industry by learning how to communicate around supply chain resilience and operational risk, and understand how the influx of passive investors in the sector impacts your IR and ESG program. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Adam Borgatti, Senior vice president of corporate development and investor relations, Aecon**
1.15 pm	**IR in the healthcare sector: Build credibility and understand how healthcare policies will impact IR** The global pandemic has had a significant impact on health policies and the healthcare sector globally. During this session we look at what IR can do to build management's credibility with investors at a time of increased interest. We examine how IR teams can help onboard new investors that may need bringing up to speed on the scientific details of the businesses and examine what lies ahead for M&A activity in the sector. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Josie Afolabi, Director of investor relations, AstraZeneca** **Andrew Swift, Head of investor relations, Smith-Nephew** **Tom Waldron, Director of investor relations, AstraZeneca**
2.00 pm	***Session break***
3.00 pm	**How issuers and investors are applying new technologies** How is technology changing investing and investor relations? There has been much talk around how the buyside are developing artificial intelligence to assist investment decisions and how that would impact the role of IR.

	Technology is also making the stock market more accessible for retail investors, and we have recently seen a rising trend of retail investors. We debate whether the application of these technologies are going to have an impact on investor relations in the next decade and ask if IR teams are at risk of falling behind in terms of their technology use. **Moderator: Laurie Havelock, editor-at-large, *IR Magazine*** **Greg Secord, Vice president of investor relations, Opentext** **Vladimir Zluzhsky, Head of communications and investor relations, Severstal**
4.00 pm	***Networking break***
4.30 pm	**IR in the consumer cyclical sector: Adapting messaging for a cyclical investor base** Discuss how to balance the long-term and short-term dynamics in your messaging to attract value investors but maintain trust with growth and GARP investors. **Moderator: Ben Ashwell, editor, *IR Magazine*** **Lori Keith, Portfolio manager and director of research, Parnassus Investments** **Debbie Hancock, Senior vice president of investor relations, Hasbro**
5.15 pm	**The newly emerging IRO: Predictions for 2021 and beyond** In our final session, we look to take stock of the changes in 2020, how permanently it will affect the IR profession and what lessons can be learned. We then look to the year ahead and review the skills required and challenges facing IROs over the coming 12 months. **Smooch Repovich Reynolds, Managing director and partner, ZRG Group**

Day 1 Day 2 Day 3