



IR Magazine Forum & Awards – Greater China 2023

Friday, December 8, 2023
In-person event: 9 am – 2.30 pm HKT

Winning in a new market environment

AGENDA

8.15 am **Registration, breakfast and networking**

8.55 am **Opening remarks: Welcome to the forum**

Laurie Havelock, editor-at-large, IR Magazine

9.00 am **Investor relations in a changing investment landscape**

Inflation, interest rates and geopolitics have caused investors to re-evaluate their investment strategies within the Greater China region.

Our opening session explores how markets are changing, what IR teams can do to adapt, and how best to measure IR success in today's investment landscape.

- Discuss the outlook for the US-China relationship and the impact on fund flows to the Greater China region
- Discuss the impact of a property crisis and liquidity concerns on stocks and investor sentiment
- Learn how IR can have an impact in a stagnating market: managing risk and maximizing opportunity
- Understand how to explore capital-raising opportunities in new geographies
- Debate how best to communicate with investors during times of economic uncertainty

Moderator: Laurie Havelock, editor-at-large, IR Magazine
Jason Paltrowitz, executive vice president, OTC Markets Group
Peggy Tsai, investor relations manager, Chenbro Micom

9.30 am **How to prepare for mandatory climate-related disclosures**

The Stock Exchange of Hong Kong has proposed to mandate all issuers to make International Sustainability Standards Board (ISSB) aligned climate disclosures in their ESG reports.

This session will share guidance on how companies can comply with the new reporting rules and ways to use ESG to the advantage of investor relations.

- Preparing for scope 3 greenhouse gas emissions reporting: how to collect, measure and disclose your data
- Understand how best to communicate transition plans and links between climate-related considerations and executive remuneration
- Learn how to use your ESG disclosures to attract capital to your organization



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Jessie Xiaoyi Jin, chief manager, investor relations and ESG, ATRenew
Christy Liang, board secretary & chief director, IR & ESG, ENN Natural Gas Co

10.00 am Networking break & refreshments

10.30 am Artificial Intelligence: How to use generative AI to enhance your IR program

Globally IR teams have been experimenting with artificial intelligence since the world discovered ChatGPT.

This session will demonstrate how companies are using generative AI to improve the efficiency, quality and output of their IR activities, and discuss the future possibilities for the technology within the IR profession.

- Hear case studies about how IR teams are using AI within their IR programs
- Opportunity or threat: Understand how to navigate the security concerns, limitations and risks when using artificial intelligence
- Discuss the best applications for generative AI in IR and hear how to implement them

Moderator: Steve Wade, head of content, IR Magazine
Erik Carlson, COO and CFO, Notified

10.50 am Digital engagement strategies

As communication technologies continue to evolve we explore how best to utilize these tools to expand the reach of your IR program and promote better transparency with your shareholders.

This session will showcase effective techniques award-winning IROs have implemented to improve their communication using different media channels.

- Understand the latest digital communications trends in the context of investor relations
- Learn how best to use WeChat and other social media to tell your company story
- Understand how best to build your presence in an increasingly digitalized world
- Discover the post-pandemic impact on retail investor communications and how to reach this audience digitally.

Moderator: Laurence Taylor, senior conference producer, IR Magazine
Akshay Coppa, Partner and vice president of Products, Euroland IR
Stanley Zhou, Director of capital market and investor relations, Zhongan Online P&C Insurance



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11.20 am **Reimagining investor targeting: Optimizing your engagement strategy**

In today's market environment finding fund managers who are best positioned to invest in your company is critical and requires an analytical and methodical approach.

In this session, we will explore going beyond peer analysis to provide insight into how to use alternative data to enhance your success during investor meetings.

- Go beyond peer evaluation and learn how to use alternative data sets to identify key investment targets
- Make better use of management's time by identifying the conferences and investor engagements that yield the biggest returns
- Prepare your roadshows better by understanding which portfolio managers will make a significant difference to your stock and how best to engage with investors that can have the biggest impact on your share price

Moderator: Laurie Havelock, editor-at-large, IR Magazine
Owen Howden, senior associate of investor engagement, Nasdaq
William Tsang, head of research, portfolio manager, Chartwell Capital
Rui Zhang, CEO, Irosters

12.00 am **Successful hybrid investor engagement**

Covid-19 restrictions are a distant memory, however, travel to and from the region is still not back to pre-pandemic levels, and companies have seen the efficiency benefits of virtual investor engagement.

This session explores how companies can best implement a hybrid IR strategy that increases transparency, builds better relationships and creates a meaningful dialogue between management, IR, the analyst community and the buy-side.

- Discover how other IR professionals have adapted to the challenges and opportunities of the new hybrid landscape
- Learn how to take your virtual engagement to the next level and build strong relationships with your target audience
- Find out how best to utilize your management's time and resources within a virtual framework

Moderator: Steve Wade, head of content, IR Magazine
Nick Huang, investor relations manager, Foxconn
Christy Lam, director, investor relations, Link Asset Management

12.25 pm **Closing remarks**



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12.30 pm **Networking lunch and awards presentation**

2.30 pm **End of forum and awards**