

IR Magazine Forum – US 2021

IR STRATEGIES FOR 2021

Tuesday, March 23

LIVE AND VIRTUAL

About the event

The **IR Magazine Forum – US 2021** brings IR professionals together from across the US to plan their IR strategies for the year ahead. A new administration and SEC regime, ongoing uncertainty related to the scale and timelines of Covid-related disruption and continued growth of ESG practices result in questions related to the regulatory outlook, IR strategies and communications. This forum aims to aid you in making the big decisions around your IR calendar, create relevant communications for the year ahead and advise on how to make the most of your investor relations efforts over the next 12 months.

[Register For The Forum Here](#)

Agenda at a glance

All times are in ET (Eastern time)

Time	Tuesday, March 23
10.30 am	Welcome to the IR Magazine Forum – US 2021
10.45 am	Regulators, Reddit and a recovery? A recap on what's happened in IR and what could be to come
11.30 am	The post-pandemic IR function 2021
12.00 pm	Networking break
12.15 pm	How are IR teams building marketing calendars this year?
1.00 pm	[Roundtable discussion] A practical guide to virtual events
1.30 pm	Networking break
1.45 pm	Stream One: A guide to ESG index and fund inclusion Stream Two: Post-pandemic messaging and attracting analyst coverage
2.30 pm	International exposure and opportunities for new capital sources exposed by the pandemic
3.15 pm	Networking break
3.30 pm	Expanding your reach and knowing your shareholders better through your investor meetings
4.00 pm	Corporate access is changing... but how are you adapting?
4.30 pm	Networking break
4.45 pm	Making the most of your virtual shareholder meetings
5.15 pm	[Presentation] The final thought: Natural language processing and artificial intelligence for investor relations professionals
5.30 pm	Summary and end of conference

[Detailed agenda below](#)

IR Magazine Forum – US 2021

IR STRATEGIES FOR 2021

Tuesday, March 23
LIVE AND VIRTUAL

Agenda

All times are in ET (Eastern time)

10.30 am Welcome to the IR Magazine Forum – US 2021

10.45 am Regulators, Reddit and a recovery? A recap on what's happened in IR and what could be to come

As a conduit between the markets and management, it's important to keep your finger on the pulse of potential upcoming market trends. This session will discuss the possible opening up of the economy, any regulatory changes on the horizon with an incoming administration and the potential implications for IR and markets given the increased influence of social media and retail investors.

- The incoming administration and new SEC chair: What these changes mean for regulation and US equities
- What the post-pandemic world and economic recovery will look like and what that means for US markets
- Discuss how much lasting change the rise of retail investors and the power of collective action will have on 13F reform and liquidity

11.30 am The post-pandemic IR function 2021

Discover how the IR role has evolved and is likely to evolve over the coming years, whether remote work will change the makeup of your IR team and discuss the emerging career opportunities for IR Officers.

- Understand the role of IR coming out of the pandemic: What are boards and CEOs envisioning for the future of investor relations.
- How can ambitious IROs become more involved in corporate development, sustainability, strategy and treasury activities and can IROs apply their skills at private companies and SPACs?
- Has the opportunity arisen for a wider pool of talent as a result of remote working?

12.00 noon Networking break

12.15 pm How are IR teams building marketing calendars this year?

In this session we aim to map out the key milestones that will enable a transition back to hybrid and in-person IR activities, helping IR teams plan their roadshows and investor days more effectively.

- Are there provisional plans to return to in-person? What are the controls and what do companies need to see in terms of policy movements to return to hybrid/in-person meetings?
- Which destinations are likely to open up earliest, and how quickly will company travel policies relax?
- Hear practical advice about how to approach virtual investor days and create a unique virtual experience for your shareholders
- What considerations need to be made for a hybrid event?

1.00 pm [Roundtable discussion] A practical guide to virtual events

Learn how to turn your virtual meetings into digital experiences that are memorable and run seamlessly. Join this interactive roundtable to share experiences, learnings and ideas about what you can do to take your virtual engagements to the next level.

1.30 pm Networking break

IR Magazine Forum – US 2021

IR STRATEGIES FOR 2021

Tuesday, March 23
LIVE AND VIRTUAL

1.45 pm Stream One: A guide to ESG index and fund inclusion

In this session we will provide practical insight into what teams need to do to be included in ESG indexes or large ESG funds, aiming to take the ESG conversation forward from 'you need to report' to 'how and what to disclose.'

- Learn about the specific disclosures you should focus on to qualify for an ESG fund at large institutional investors
- Debate whether ESG teams at funds exist, and how ESG is starting to impact decisions outside of those socially responsible teams
- What the ESG priorities are for investors and proxy advisors in 2021 and what you can do about it

Stream Two: Post-pandemic messaging and attracting analyst coverage

Share ideas about what companies can do with their strategic communication plans to help them attract the right investors as we come out of the pandemic. In particular, this session will focus on the content of their messaging and which mediums can best deliver that messaging.

- Will Covid-19 permanently change investor behaviors and priorities?
- How to increase your company and management's visibility in the wider media
- What are investors and analysts looking for in 2021 from businesses, and will companies need to suspend guidance in 2021?
- How are different investors affected in this environment and what you can do to tailor your approach

2.30 pm International exposure and opportunities for new capital sources exposed by the pandemic

This session aims to help maximize the opportunities created by the pandemic by providing insight into how to use marketing and targeting activities to internationalize analyst and investor base for those opportunities. We will also discuss how companies can get more value out of their shareholder ID activities, given the current increased flow of funds.

- Discover the strategies you can apply to internationalize your shareholder base
- Understand the different routes and mechanisms and communication tools that you can use to get noticed by the global investment community
- Has Mifid II impacted your ability to find steady holders from outside the US?
- How to find helpful targeting data for those that aren't filing their 13Fs and how to make the most of your surveillance data

3.15 pm Networking break

3.30 pm Expanding your reach and knowing your shareholders better through your investor meetings

IR teams have done a brilliant job at shifting to virtual investor meetings and getting to grips with the practicalities of the medium. Now this session looks at how to use virtual meetings as a strategic element of your IR program which can add value and inform your activities.

- How to turn data such as engagement scores, interest-levels and connectivity to content into actions
- Learn how to attract and manage a broader audience through your virtual IR activities and find quick wins to engage your retail shareholders
- Understand which events companies and investors are hosting and attending, how that has changed and what the future holds

IR Magazine Forum – US 2021

IR STRATEGIES FOR 2021

Tuesday, March 23
LIVE AND VIRTUAL

4.00 pm **Corporate access is changing... but how are you adapting?**

This session looks to evaluate the impact Mifid II, Covid-19 and the emergence of more buy-side corporate access functions has had on the established corporate access relationship, and discuss what resources, strategies and tactics IROs need to help them make the most of their investor meeting.

- Learn about the lasting effects Mifid II, Covid-19 and the growth of in-house corporate access will have on the investor-issuer-broker relationship
- IROs are engaging investors directly more and more. Discover how to make the most of your engagements and leverage relationships with corporate access professionals on the buy side
- Understand how to find new funds, portfolio managers and analysts through your relationships with corporate access teams, and discuss the importance of feedback as a strategic tool

4.30 pm **Networking break**

4.45 pm **Making the most of your virtual shareholder meetings**

The significant increase in the use of virtual shareholder meetings in 2020 demonstrated that improvements must be made to the processes and policies surrounding virtual shareholder meetings. This session will discuss the practical and strategic aspects around admitting beneficial shareholders and delivering an effective AGM.

- Learn lessons from challenges faced during previous virtual shareholder meetings
- Discuss what considerations need to be made with respect to the proxy process to ensure that virtual AGMs best replicate an in-person meeting
- Discover the practical steps that you can take to ensure access to beneficial owners

5.15 pm **[Presentation] The final thought: Natural language processing and artificial intelligence for investor relations professionals**

The increasing use of machine learning and artificial intelligence by investors to create investment theses and make investment decisions calls for a different type of thinking. In this session we focus on the practical steps you can take to ensure your communications are correctly interpreted by both humans and machines.

- Discover the type of language you should use in your 10K to give the best opportunity for algorithms to find your stock
- How to apply artificial intelligence in real life: What considerations need to be made with the software funds use and the language you use?
- How can IROs use AI tools to automate IR activities and be readily informed with investor grade analytics

5.30 pm **Summary and end of conference**

Register For The Forum Here

FORUM PARTNERS

