IR Magazine Forum – US 2021

IR STRATEGIES FOR 2021

Tuesday, March 23

LIVE AND VIRTUAL

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 help you make big decisions around your IR calendar, create relevant communications for the year ahead and 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 and a recovery: Buyside trends and the latest happenings in IR
11.30 am	2021: The IRO Launching Pad to Loftier Success
12.00 pm	Networking break
12.15 pm	The outlook for stocks in the context of the broader financial market
1.00 pm	[Roundtable discussion] Transitioning back to hybrid meetings
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

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Agenda

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10.30 am **Welcome to the IR Magazine Forum – US 2021**
Ben Ashwell, editor, *IR Magazine*

10.45 am **Regulators and a recovery: Buyside trends and the latest happenings in IR**

As the conduit between markets and management, it is essential to keep your finger on the pulse of market trends and investor sentiment. This session will look at how the buy-side views lifting restrictions and opening up the economy, the regulatory direction with the incoming administration, and more recent news in investor relations.

- Learn how optimistic investors are about the coming months and the impact of opening up the economy
- Discover the issues that are top of mind for the buy-side and issuers
- Understand the direction of travel for future regulations with the backdrop of a new administration and SEC chair
- Discuss whether the recent increase of retail investors will have a lasting impact on markets, 13F reform, and investor relations

Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Gregg Lampf, vice president of investor relations, Ciena
Dylan Yaworski, director of the perception study practice and research center of excellence, Corbin Advisors

11.30 am **2021: The IRO launching pad to loftier success**

Discover how the IR role has evolved and is becoming one of the most critical partnerships to management teams and Boards. Learn about the emerging career opportunities that are taking the spotlight, which will influence the direction of the profession for the next five years.

- Understand what boards and executives are envisioning for the future of the investor relations function IR leaders
- How can ambitious IROs become more involved in corporate development, sustainability, strategy, and treasury activities
- Will the concept of Special Purpose Acquisition Companies impact the IR profession, and if so, how?
- Have virtual working arrangements affected the IRO role, and how will this affect the future talent pipeline for the profession?

Moderator: Ben Ashwell, editor, *IR Magazine*
Smooch Repovich Reynolds, Managing director of the global IR and chief communications officer practice group, ZRG Partners

12.00 noon **Networking break**

12.15 pm **The outlook for stocks and bonds in the context of the broader financial market**

At a time of significant disruption in markets, we look into the impact of recent events on how companies raise funds and the overall effect on the competition for investment dollars on a broader scale. In an environment where "macro matters" more than ever, we hear a top-down perspective on the major market forces that drive earnings.

- Understand the long-term effect Covid-19 and stock market volatility will have on equities compared to fixed income
- Learn about the impact of monetary and fiscal stimuli on markets and how liquidity plays into 2021 investment views
- Debate if the investment industry pays enough attention to tail risks and black swan events?

Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Sébastien Page, head of global multi-asset, T-Rowe Price

1.00 pm **[Roundtable discussion] Transitioning back to hybrid meetings**
In another forward-planning session, we will be using the interactive format to talk through how you can prepare for the transition back to in-person meetings. Join this session to discuss how to manage participation, access, and activism as part of your IR activities.

Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Simon Bryan, managing director of Americas, Lumi

1.30 pm **Networking break**

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1.45 pm

Stream One: A guide to ESG index and fund inclusion

In this session, we will provide practical insight into actions teams can take 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 the value of ESG teams at funds and how ESG is starting to impact decisions outside of dedicated responsible investment teams
- Hear about the ESG investors and proxy advisors' priorities in 2021 and what you can do about it

Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Andrea DeMarco Sieger, senior vice president of investor relations, corporate communications and ESG, Norwegian Cruise Line Holdings
Mary Green, portfolio manager, Federated Hermes
Sonia Zugel, chief executive officer, ESG Playbook

Stream Two: Post-pandemic messaging and attracting analyst coverage

Share ideas about what companies can do with strategic communication plans to 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 message.

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

Moderator: Ben Ashwell, editor, *IR Magazine*
Andy Rusie, chief financial officer, Whole Earth Brands

2.30 pm

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

This session explores created by the pandemic for increased targeting of international analysts and investors. Discuss to get more value out of their shareholder ID activities and apply strategies to internationalize your shareholder base.

- Ascertain whether internationalizing your investor base by discussing the pros and cons of targeting global investors
- Understand the different routes and mechanisms, and communication tools that you can use to get noticed by the international investment community
- Learn about the nuances of going on the road in alternative markets, and understand what investors expect in terms of meeting structure
- Discuss the impact that Mifid II has had on international investors and what you can do to overcome the challenges of having holders from regions that don't disclose as much as home-country investors
- Learn about the latest regional trends uncovered by the IR Magazine Roadshow Report and apply them to your targeting strategy

Moderator: Ben Ashwell, editor, *IR Magazine*
Ari Davies, global head of corporate analytics, IHS Markit
Keri Mattox, senior vice president of investor relations and chief communications officer, Zimmer Biomet

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. This session looks at how to use virtual meetings as a strategic element of your IR program, which can add value provide vital feedback to 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

Moderator: Ben Ashwell, editor, *IR Magazine*
Mark Loehr, chief executive officer, OpenExchange

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

This session evaluates the impact of Mifid II, Covid-19, and increased direct contact with the buy-side on corporate access. We discuss the 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

Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Mark Labay, executive vice president and chief financial officer, Everi
Catherine Miles, director and head of corporate events, SVB Leerink

4.30 pm **Networking break**

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

Increased adoption of virtual shareholder engagements demonstrated the need to improve processes and policies surrounding the format. 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 for the proxy process to ensure that virtual AGMs best replicate an in-person meeting
- Discover the practical steps that you can take to provide access to beneficial owners

Moderator: Ben Ashwell, editor, *IR Magazine*
Sherry Murdock Moreland, president and chief operating officer, Mediant Communications

5.15 pm **Natural Language Processing's role in an investor relations program**

Given the increased focus of natural language processing and machine learning from investors, we examine how this emerging practice impacts an investor relations officer's role.

- Discover the adoption of these techniques among investors and how much of a material impact they have on IR teams.
- Is it a better use of IR teams' time to focus on algorithms or the use of NLP as a feedback mechanism?
- Control your controllables: Debate whether it is a better use of IR teams' time to focus on algorithms or the use of NLP in your shareholder targeting
- Discover the type of NLP applications beyond single words and generic sentiment that you can use to build trust with your investors.

Moderator: Ben Ashwell, editor, *IR Magazine*
Nick Manzing, director of research, Sentieo

5.30 pm **Summary and end of conference**

Ben Ashwell, editor, *IR Magazine*

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