



IR Magazine Forum – Small Cap

Global virtual conference

Wednesday, September 23, 2020 | Online

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09:00 **Welcome to the forum**

Opening remarks from the Chair

09:15 **SNAPSHOT: Impact of Covid-19 – what are the emerging risks and future outlooks for small and micro-cap firms?**

A short briefing to take stock of the current market, the exposures on the small cap side and the current focuses for small cap IROs.

09:30 **PANEL: Owning the narrative: strengthening your message and ensuring the evolving market understands the story**

With an unprecedented level of volatility in the market and uncertainty in the economy, it's a challenging time to tell a consistent equity story. Public companies are encouraged to focus on their long-term value proposition, while also providing short-term operational updates. In this session, we will explore how messaging has evolved over the last year, and how you can ensure the market understands your story. We will discuss:

- Best practice examples of quality, compelling small cap communications during this period of volatility.
- Practical steps you can take to adapt your communications to address a potential new investor base.
- How companies can use the IR website and other key digital tools to enhance outreach and communication.

10:30 **Coffee break**

10:45 **PANEL: Getting corporate access right in a virtual world**

Investors will almost always say that they won't invest in a company without meeting the management team first. But the opportunity to shake hands and look someone in the eye seems far away, so how can small and micro-cap companies run a successful virtual corporate access program? For virtual investor meetings how ambitious should you be with your investor targeting and engagement efforts?

- How do you run an entirely virtual roadshow, and what have been some successes and failures?
- Accessibility: what are some new approaches to corporate access?
- Expanding investor base in crisis mode: what are the best ways to continue to develop new relationships over the next year?
- What is an appropriate use of management's time?
- How do you manage expectations virtual engagements while making sure time is used efficiently.
- Are companies planning to integrate virtual strategies into their long-term outreach plans?
- How can small cap IROs get a foot in the door with large investor targeting events?

11:45 **Coffee break**

12:00 PRESENTATION: Responding to the changing investor base during Covid-19, and attracting the right investors for your company

How has the small cap investor base evolved? Has there been a move towards passive vs active, value, or short-term investors? What does this mean for long-term prospects for small caps and liquidity?

12:15 PANEL: Generate visibility: how to target analyst coverage

Sell-side coverage can help small and micro-cap companies gain more visibility, liquidity and trading volume. During times of crisis, a tenured sell-side analyst can also act as an extension of the IR team, helping to reassert a company's equity story. But sell-side coverage of small and micro-cap companies has decreased in recent years, due to sell-side economics and regulatory changes. In this session, we'll discuss how companies can attract sell-side coverage and what alternatives exist.

- How can small caps react to the impact of MiFID II on their analyst coverage?
- How have small cap companies improved and increased their work with the sell-side? What are best practice strategies for engaging covering analysts?
- What strategies can small cap IROs adopt to maximize their existing analysts?
- What are the pros and cons of paid-for research, and how can small caps access different pools of research?

13:15 Coffee break

13:30 PANEL: Doing more with less: prioritizing an ESG journey as a small cap

As ESG becomes an increasingly unwavering factor for investors and regulators worldwide, small caps are stretched to meet the requirements. Learn ways to keep up with large cap companies and harness ESG for your business advantage.

- Obtain ESG scores without a big spend or resource requirement.
- What resources are available?
- What is the post-Covid-19 impact on ESG, and what do future priorities look like?
- How to manage the increasingly important element of social governance

14:15 Coffee break

14:30 Live Q&A: Meet the portfolio managers. What do investors and analysts want from small caps at this time?

This session gives the opportunity to have your questions answered by investors and analysts, understand how the markets are viewing key issues of the day, and what is driving current decisions.

- How are investors looking at companies differently during the current market crisis?
- What are the main priorities and concerns about small cap shares?
- What have been some solid examples of successful communication during Covid-19?

15:15 BREAKOUTS: Join other delegates to discuss a key topic of your choice in our interactive discussions

In this session, delegates can choose from one of three key themes and participate in a secure video chat with fellow small cap IROs.

- [The ESG challenges of small caps](#) – Join this breakout session to share what you are doing to

succeed with ESG as a small cap, in a market dominated by large caps with big budgets and resources. How can small caps get ahead, get on indexes and benefit from this movement?

- Virtual corporate access – What have been some best practice or forward-thinking methods of corporate access during the pandemic, and what is the future looking like for new technologies in the IR world? This session will look at the successes of virtual earnings calls, investor days, and tips and tricks to succeed.

- Attracting sell-side coverage – This session debates the benefits and challenges of securing sell-side coverage, whether paid for analysis is worth it, and how small caps can harness compelling comms to access the right analysts for their company.

-How to run an IR program as a small or micro-cap – From budgets to press coverage, messaging and marketing, this session will tackle the unique challenges of small and micro-cap companies, and will break down the key components of running an effective small or micro-cap IR program.

15:30 Summary and close of forum