

IR Magazine Forum – Small Cap 2021

Emerging stronger from the pandemic & maximizing visibility

Thursday, September 23 2021

Virtual event

The IR Magazine Forum - Small Cap 2021 is designed specifically to help small and micro-cap issuers establish the best possible IR program as the economy recovers.

Hear from small-cap investors and issuers on the new approach to maximizing visibility, how to overcome budgetary constraints for ESG and targeting, and the industry consensus on in-person meetings over the coming months.

AGENDA

All times are in ET

- 10.30 am **Platform opens: Meet the attendees**
- 10.55 am **Welcome to the IR Magazine Forum – Small Cap 2021**
Opening remarks from the chair
- 11.00 am **Future outlooks for small and micro-cap stocks**
As the economy recovers across North America, small-cap sensitivity to economic change offers the potential for positive growth in the coming months. To keep your finger on the pulse of capital markets trends to be aware of and investor sentiment for small-cap companies, attendees in this session can:
- Hear economic updates on the implications of inflation and interest rates.
 - Discuss what the most important emerging trends are within the investment community, and where to focus your attention as a small-cap.
 - Hear perceptions and perspectives on global small-cap stocks beyond 2021.
- 11.30 pm **A buy-side & issuer perspective on IR engagement trends post-2021**
As the end of the year promises a partial move back to in-person meetings and conferences, small-caps need a sense of what other companies are planning for in the mid-long term, and what investors are expecting. To help small-caps understand how the IR function can best operate going forward, this session will give insights on:
- The industry consensus on splitting the engagement calendar into virtual vs in-person interactions.
 - Buy-side and corporate access expectations for engagement with IR and senior stakeholders within the company.

- How to set expectations for future interactions with stakeholders and continue to measure the success of your approach.

12.30 pm **Meet the attendees: Networking**

Take some time to meet other attendees via a quick, 1-1 video chat. You have five minutes to introduce yourself and share contact details before you're on to meeting the next person!

12.45 pm **Streamed sessions**

- **STREAM ONE: What does the future hold for small-cap investor days?**
As large events in the small-cap diary serve as a critical function for building relationships with stakeholders, it's important to ensure you are organizing the most effective events calendar. How do you ensure maximum engagement if running a virtual/hybrid event? How do you set realistic expectations and performance management programs? If the event is in person, how do you account for international investors who are not receptive to travel? This session will share ideas on how to organize the most impactful large events after travel restrictions are lifted.
- **STREAM TWO: Manage your language and tone data to better tell your story**
In this session, attendees will hear examples of different ways the investment community are currently analyzing issuer data on language, tone and sentiment. We will discuss how small-cap IR can react, how to start managing your public data, and what to pay attention during public meetings and earnings calls.

13.15 pm **Meet the attendees: Networking**

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13.30 pm **Overcoming the small-cap ESG challenge**

As the number of ESG funds grow and higher inside ownership leads to more scrutiny, smaller companies are coming increasingly under the spotlight. This session will share practical insights on how to keep up with the required KPIs for ESG. Attendees can hear:

- How IROs can interact with internal teams to create the most streamlined small-cap ESG program, and where IR should sit within this process.
- How to avoid missing the boat on key ESG factors and ensure sufficient ESG data which tells the complete company story.
- What are the areas of key interest when it comes to small-cap companies from the perspective of the buy-side?

14.15 pm **Meet the attendees: Networking**

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minutes to introduce yourself and share contact details before you're on to meeting the next person!

14.30 pm

Streamed sessions

- **STREAM ONE: The art of storytelling: Strengthening your message to attract international investment**

With global capital markets becoming more connected, small-caps can benefit from improving communications with a wider pool of investors. This session will delve into the best tools and strategies small-cap IR can use to increase interest from international investors, and how to best tell your company story to a range of potential investors.

- **STREAM TWO: Making your mark as an IRO and maximizing your role**

This session will give attendees key takeaways on strategies for career maximization of the investor relations role. We will delve into the IR strategy for small-cap IROs over the next few years, how senior management is currently viewing IR, and how an IR professional can make the most out of their role after economic recovery.

15.15 pm

Stepping up to strengthen your marketing position: How to engage with analysts and generate visibility

As evolutions in the sell-side ecosystem continue to change the ways small-cap IROs get visibility from investors, are there new ways of re-thinking your marketing strategy? To offset the reduction in covering analysts of small cap stocks, attendees in this session can:

- Learn new tools, routes and tactics to get access to covering analysts and improve visibility.
- Learn about key developments regarding the sell-side research squeeze and the implications for small-cap IR as a whole.
- Understand what alternatives exist to traditional routes of seeking covering analysts – how are IROs improving success by direct marketing?

16.15 pm

Closing remarks and end of forum