



IR MAGAZINE FORUM – SMALL CAP

Increasing coverage and navigating a downturn

Tuesday, September 20, 2022
In-person and virtual: AIG offices, New York

AGENDA

All times are in ET (Eastern Time)

8.00 am Registration, refreshments and networking

9.00 am Welcome to the IR Magazine Forum

Lucy Fato, executive VP, GC and global head of communications, AIG
Steve Wade, head of event content, IR Magazine

9.15 am A global recession: The impact of market forces on small-cap companies

We will start our day with this **view of capital markets and macroeconomic trends**. The session will set the scene with an update on global markets, fund flows, **where the economy is headed in ten years**, M&A and how IR teams at small-cap companies can prepare for what is to come in 2023.

Jonathan Paterson, founder and managing partner, Harbor Access

9.45 am Increasing analyst coverage and targeting investors in a hybrid, uncertain market

This panel will **discuss innovative and new ways** of targeting potential investors. What are the best practices around scheduling NDRs and determining which cities are open and which are closed? How to **attract the right investors** with the tools available and fewer resources? What opportunities created by the pandemic can help **'globalize' your shareholder base**? How are companies providing **financial guidance during these times**?

We'll explore new ways to **secure additional sell-side coverage**, maximize the use of management's time, and weigh the pros and cons of paid analyst coverage, social media, and **recent corporate access trends** going into 2023.

Moderator: Steve Wade, head of event content, IR Magazine
Adele Carey, VP of investor relations, BTCS
Stan Kovler, VP of corporate strategy and IR, Extreme Networks
John Nunziati, investor relations partner, Q4

10.30 am Coffee break and networking



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11.00 am **Running a strategic IR function: Top-down approach to delivering shareholder value**

What is the role of an IRO during a post-pandemic downturn? How does it compare to the 2008 recession, and what can we learn from those who successfully navigated past market uncertainty? How should you **restructure resources** when access to capital markets is challenging?

Given the outlook for the next 18 months, what are the **priorities and expectations of IR teams** to effectively communicate shareholder value? How will this change in ten years? We'll explore how to run an IR team, **what CFOs expect from IR teams**, how to manage up and coach your c-suite, and emerging best practices.

Moderator: Laurence Taylor, senior conference producer, *IR Magazine*

Aaron Howald, VP of IR and business development, Louisiana-Pacific Corporation

Julie MacMedan, vice president of investor relations, LL Flooring

Quentin McMillan, vice president, managing director & head of investor relations, AIG

Daniel Virgilio, executive director, global head of surveillance & targeting, S&P Global Market Intelligence

11.45 am **ESG strategy: Meeting increasing investor expectations as a small cap**

Keeping on top of **ESG alongside existing IR responsibilities** can be challenging for an IR team with limited resources. We'll discuss strategies to **deliver a concise ESG story** that communicates long-term value creation to investors and wider stakeholders.

With the announcement of the new regulations, the expectations around the **quality of ESG disclosures** have increased significantly. We will discuss how to create a comprehensive engagement strategy that **effectively communicates the risks and opportunities** that are material to your business.

Moderator: Laurence Taylor, senior conference producer, *IR Magazine*

Seth Forman, president of ESG, Socialsuite

Anthony Garcia, senior director of investment stewardship, Nuveen Responsible Investing

Neil Stewart, director of corporate outreach, IFRS Foundation

12.30 pm **Small stocks, big money: How small cap investors develop their investment strategy**

Dave Gentry, CEO, RedChip Companies

12.50 pm **Lunch break**



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1.45 pm **Investor Q&A: Expectations of small-cap IR teams in the coming months**

During this session, our **panel of investors and analysts will address any concerns** and questions you may have about the coming months. **Are investors tired of virtual events? How to increase analyst coverage?** What do investors want from IR in a hybrid world and during a downturn? What are **the predictions for the coming months?** What sectors are investors favouring going into 2023?

Moderator: [Steve Wade](#), head of event content, *IR Magazine*

[Sourabh Banerji](#), small-cap equity PM, Columbia Threadneedle Investments

[Thaddeus Pollock](#), portfolio manager, Cramer Rosenthal McGlynn

[James Wong](#), head of corporate access origination, Millennium Management

2.30 pm **Champagne roundtables: Exchange ideas and best practices with a glass of champagne!**

How the roundtables work

- Choose any of the following topics and join the relevant roundtable
- When the bell rings, move on to the next topic of your choice and repeat
- Hear a summary of key action points from each table on each topic at the end
- Enjoy a glass of champagne or a non-alcoholic beverage!

Topics to choose from

- How to adapt your IR strategy and raise capital in a downturn: [Laura Kiernan](#), CEO and founder, [High Touch Investor Relations](#)
- How to resource an IR team to deliver an ESG story that communicates long-term value creation: [Matthew Gardner](#), founder and managing partner, [Sustainerv](#)
- How to effectively use digital platforms and messaging to attract retail investors: [Laurence Taylor](#), senior conference producer, *IR Magazine*

3.30 pm **Roundtable summary and closing remarks**

[Steve Wade](#), head of event content, *IR Magazine*

4.00 pm **Drinks reception and networking**