

# IR MAGAZINE VIRTUAL THINK TANK – WEST COAST

EXCLUSIVELY FOR HEADS OF IR AND CFOS

Wednesday, April 29, 2020

## Capital competition, climate change and corporate access

Join us for an exclusive event for investor relations officers and finance heads to discuss the biggest issues impacting public companies and their relationships with shareholders in 2020.

### 09.15 **Welcome to the virtual think tank and introduction**

Ben Ashwell, editor, *IR Magazine*

### 09.30 **The big picture: Passive to active...? [Panel discussion]**

This discussion looks at the major trends impacting public companies in the US. We ask how markets and regulations are changing and what IR teams need to do to succeed in the shifting environment.

- Will we eventually see a snap back to active management?
- How will the 2020 election impact SEC rules on proxy advisory and corporate disclosure?
- Where are investment funds flowing and what does the future look like for US public companies and their IR teams?

### 9.55 **5-minute interval**

### 10.00 **How the stock market operates at times of crisis [Panel discussion]**

To help understand how the markets are likely to react to the global pandemic and future black swans we observe some of the patterns of behavior during previous crisis'

- The current environment and impact on overall market functioning
- How will different market participants react?
- The potential impact on SEC actions, rulings and enforcement

### 10.35 **5-minute interval**

### 10.45 **Covid-19: Key action points for IROs [presentation]**

The spread of the Covid-19 virus is taking its toll on the economies, markets and businesses globally. California has been uniquely impacted and declared a state-of-emergency and this session seeks to provide clarity around how heads of IR can address the situation; practically in terms of the running of their own operations, and in terms of shareholder communications.

- What impact will market volatility arising from Covid-19 have on your role?
- What should you say to investors and analysts when discussing recent developments?
- What do the buy-side and the sell-side want to know, what questions are likely to be asked on earnings calls?
- What preparations do you need to put in place for your investor days, meetings and conferences?

### 11.00 **Roundtable discussions on the big issues facing IR today [Roundtable discussion]**

### 11.15 **10-minute break: Join your colleagues in the networking area!**

### 11.25 **Navigating a shifting corporate access landscape**

The trend of institutional investors building out their own corporate access teams continues, and this session looks at which changes IROs should make to their targeting strategies and roadshow execution.

- Understand how best to discover, engage and interact with buy-side corporate access teams, both now and in the future when these teams become even busier
- Hear exclusive insight from a report that outlines major trends in targeting, roadshow execution and measurement of marketing success
- Understand how to work with the sell side and adapt your targeting strategy to broaden your investor base, creating meaningful meetings for management

### 11.45 **Discussions on changes to corporate access [Roundtable discussions]**

### 12.00 **5-minute interval**

### 12.05 **Dear CEO, how are you improving your E&S rating? [Panel discussion]**

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As more investors want better climate disclosures, we take a more focused look at this important ESG factor. Learn how to link environmental & social factors back to your business and disclosure activities.

- When shareholders write open letters to your CEO stating climate change is the top investor concern and request that you report against TCFD and SASB requirements, what is IR's role in handling the board and management's reaction to these requests?
- How should IR prioritize ESG activities? Understand the data sources investors use to evaluate your E&S practices, how they use this data and the extent to which it influences investment decisions
- Share practical examples about how you approach ESG in your industry and prioritizing your E&S activities

**12.45 Communicating culture and prioritizing your ESG activities [Roundtable discussion]**

**13.00 10-minute break: Join your colleagues in the networking area!**

**13.10 What the C-suite wants from IR teams [Panel discussion]**

In this unique session, we speak to finance heads and seek to understand their views on the investor relations function and the skillset required to develop into a more strategic role.

- Hear from CFOs about their rise to the top and what experiences helped them get there
- Discuss how IR can broaden its remit into adjacent roles like corporate development or financial planning and analysis
- Discover different approaches to your own professional development and understand the roadmap to help you achieve your career ambitions

**14.00 Final thoughts and free networking time**

**15.00 End of conference**