

IR MAGAZINE VIRTUAL THINK TANK – WEST COAST

EXCLUSIVELY FOR HEADS OF IR AND CFOS

Wednesday, April 29, 2020

All times mentioned below are in PDT

Covid-19, capital competition, climate change and corporate access

09.00 **Platform opens: Introductions and networking**

09.10 **Welcome and opening remarks**

Laurie Havelock, editor-at-large, *IR Magazine*

09.15 – **KEYNOTE: The pivot of the future**

09.25 Understand the state of the markets both from a talent perspective as well as senior management's perspective. Learn how to anticipate the pivot of the future and what to do to stay prepared.

Smooch Repovich Reynolds, managing director, ZRG Partners

09.30 – **FIRESIDE CHAT: The big picture: Passives, pandemics and policy**

09.55 This session takes a holistic view on the current market situation

- What impact has the Covid-19 pandemic had on capital markets and how have active and passive investors responded differently to the market crash?
- How will different policies impact equity markets and subsequently IR teams at public companies?
- What are the investment implications arising from the current environment?

Moderator: Laurie Havelock, editor-at-large, *IR Magazine*

Michael Green, partner, chief strategist and portfolio manager, Logica Capital Advisers

10.00 – **PANEL: Stock market operations and reactions in times of crises**

10.40 Understand market reactions to the global pandemic and likely responses to future outbreaks/black swans by observing some of the patterns of behavior during previous crises.

- The current environment and impact on overall market functioning
- How will different market participants react?
- The potential impact on SEC actions, rulings and enforcement
- How does Covid-19 compare to previous crises and what is different this time?

Moderator: Ben Ashwell, editor, *IR Magazine*

John Ramsay, chief market policy officer, IEX Group

Ronan Ryan, president, IEX Group

10.45 – **PANEL: Covid-19 briefing: Impact on economy and public companies**

11.15 The spread of the Covid-19 virus is taking its toll on the economies, markets and businesses globally. Companies in the West Coast have been uniquely impacted and this session seeks to provide clarity around the different scenarios and impact of different policies on the economy and public companies.

Moderator: Ben Ashwell, editor, *IR Magazine*

Jill Carey Hall, head of US small and mid-cap strategy and senior US equity strategist, BofA Global Research

Pierre-Olivier Gourinchas, director of the Clausen Center, University of California Berkeley

11.15 – **ROUNDTABLE SESSIONS: Covid-19 and investor relations**

11.25

11.25 – **PANEL: Navigating a shifting corporate access landscape**

11.45 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

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Moderator: Laurie Havelock, editor-at-large, *IR Magazine*
Megan Capay, head of corporate access, Surveyor Capital
Kris Newton, vice president of corporate communications IR, NetApp

11.45 – 12.00 **ROUNDTABLE SESSIONS: Changes to corporate access**

12.00 – 13.00 **PANEL: Dear CEO, how are you improving your E&S rating?**

This session will specifically focus on two areas of ESG that are being brought into more focus this year, specifically climate change and human capital. We look at why these issues are coming into the spotlight, what investors want to know about them, and how you can address these issues.

- What is IR's role in handling the board and management's reaction to dealing with Environmental and Social related requests
- Learn about forward-looking climate related disclosures and how to address these in your IR program
- Discuss how you can address human capital and supply chain risk as part of your investor communications
- How should IR prioritize ESG activities? Understand how investors evaluate your environmental and social performances and the extent to which it influences investment decisions

Moderator: Neil Stewart, director of corporate outreach, Sustainability Accounting Standards Board
Brian Matt, director of research and analytics, IHS Markit
Jack Robinson, vice chair and portfolio manager, Trillium Asset Management
Katrina Rymill, vice president of investor relations and sustainability, Equinix
Greg Waters, technology and communications sector analyst, Sustainability Accounting Standards Board

13.00 – 13.20 **ROUNDTABLE SESSIONS: Human capital, climate change and prioritizing your ESG activities**

13.20 - 13.25 **Roundtable sessions recap**

Neil Stewart, director of corporate outreach, Sustainability Accounting Standards Board
Brian Matt, director of research and analytics, IHS Markit

13.30 – 13.40 **Final thoughts and summary**

Ben Ashwell, editor, *IR Magazine*

13.40 – 14.30 **Network with the attendees: Visit the 'networking' session**

14.30 **End of conference**