

IR Magazine Global Forum

Conference & Awards
Tuesday, October 3, 2017-Wednesday, October 4, 2017
Marriott Champs Elysées Hotel, Paris, France

DAY 1 – TUESDAY, OCTOBER 3

8.15 am **Registration, exhibition and refreshments**

9.00 am **Opening remarks: Welcome to the Global Forum**

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

Chris Hollis, chairperson, CLIFF (the French association for financial communication professionals)

Gary LaBranche, president and CEO, NIRI (National Investor Relations Institute)

9.30 am **Mifid II briefing: What IR teams need to do, resourcing and proactively dealing with the new reality**

- How is Mifid II going to impact research? Who will be most affected and how?
- Will companies have to start paying for their own roadshows and other corporate access?
- How do new third party providers and new offerings from traditional vendors come into the mix?
- Will IR end up doing more of what brokers used to do for them?
- How to get management on board to support IR in a post-Mifid world

Nick Arbuthnott, managing director, European research, Ipreo

Qian Chen, associate director, head of European operations, Ipreo

10.30 am **Morning coffee, exhibition and refreshments**

11.00 am **Investor Intelligence: Q&A with the investors, panel with the buy side and sell side**

- What do fund managers find useful – examples of IR best practice
- Navigating your way through key investment centers
- Which cities are on the up, which on the way down, which pool of investors to focus on
- Developments on the buy side – what are the top questions from investors facing issuers?
- Improving relations with the buy side – understanding what drives their decisions
- Disclosure, access, guidance – what the buy side likes (and what it doesn't)
- How the changing dynamics of paid research and corporate access will pan out
- How to make the most of sell-side relationships for conferences and non-deal roadshows

Kirsty Collins, global responsible investment, Aviva Investors

Chris Hollis, chair, Cliff and director of financial communications, LVMH (moderator)

Nicholas Melhuish, head of global equities, Amundi

Marc St John Webb, partner and fund manager, Quaero Capital - Smaller Companies Funds

12.00 pm **Next-gen targeting: Tailoring strategies for different regions**

- Building a robust targeting methodology: Using brokers to successfully target appropriate investors
- Making the best use of corporate brokers – what works, what doesn't
- Attracting foreign investment: What resources and strategies are needed?
- Managing international investors: What is the approach to targeting and decision-making?
- Differentiating communications to engage better with different types of investors
- What kind of events (one-on-ones, dinners, conferences) do investors prefer?

Brian Christie, vice president of investor relations, Agnico Eagle Mines

Kimberly Stewart, head of investor relations, Solvay

Paul Ferneyhough, corporate director, finance & investor relations, Repsol

12.30 pm Lunch and exhibition

1.30 pm C-suite panel: Providing value to shareholders with the bigger picture in mind

- Management's view of the IR function – where does IR fit into the wider company strategy?
- How to attract the C-suite's attention to secure buy-in and resources
- How are IR efforts measured by the C-suite? KPIs and benchmarking
- Monitoring shareholder changes from time to time
- Cultivating trust and confidence of lenders, investors and shareholders
- Growing your company and creating financial success – particularly during economic uncertainty

Veronika Bunk-Sanderson, director of IR and communications, Telefonica Germany

Gerbrand Nijman, group CFO, Global Telecom Holding

2.00 pm Leveraging technology and innovation to improve IR

- The increasing digitization of IR and communications, and how to stay ahead
- Choosing the tools that are right for you: What technologies ease the pressure on time?
- Measuring digital communications – what are the KPIs and tools?
- How effective have other IROs found video presentations? Can they replace face-to-face meetings?
- Accessing new, smaller or more remote investors with videoconferencing: Streaming information 24/7

Ricardo Jiménez, head of IR, Ferrovial

Tom Tyler, global head of sales, ELITE

Achim Weick, CEO and founder, EQS Group

Aurélie Cohen, head of IR, Euronext

3.00 pm Refreshment break and exhibition

3.30 pm Preparing for shareholder activism: Trends in activist targets

- How to tackle an activist attack and set up relevant preventative measures
- Getting management, the board and the IR team prepared
- Working with activists as friends, not enemies, to win the PR war

David Chase Lopes, managing director, EMEA, D.F. King

Emilie Megel, senior VP of IR, Technicolor

4.00 pm Running lean: How successful heads of IR manage their day-to-day operations

- Managing team and budget: Evaluating what adds value and prioritizing a team's time
- Doing better with limited resources and budgets: How to benchmark your IR performance
- How are IR teams across industries and market caps structured? Team sizes, roles, reporting, and so on
- How do successful IROs manage the timings and logistics of their roadshows and events?
- If on a limited budget, which third-party services should you choose? How to get the most out of it
- Is there such a thing as 'doing too much IR'? Translating positive meetings into positive market movement
- Dealing with that one difficult research analyst or a CEO who won't stick to script

Paola Durante, investor relations and strategic planning director, Moncler

Patrice Lambert, head of IR and financial communications, Orange

Thomas Kudsk Larsen, head of IR, AstraZeneca

4.45 pm Roundtable discussions

5.30 pm Global Top 50 Awards ceremony - Our global ranking of IR excellence

Join us to celebrate the world's best IR programs according to surveys of analysts and investors for the IR Magazine Awards in Europe, Asia, North America and Brazil.

6.30 pm Networking drinks reception

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DAY 2 – WEDNESDAY, OCTOBER 4

8.55 am **Welcome back**

9.00 am **Fireside chat: What makes a successful head of IR**
[Jeannie Ong](#), chief strategic partnership officer, StarHub

9.25 am **The future of investor relations: Key market changes and trends**

- The shift from active to passive investing: Why IROs should become experts in index funds and exchange-traded funds
- Big data and quantamental investing: Understand the new investor strategy that brings together quantitative screening and fundamental analysis
- AI meets IR: Use smart solutions to help IR teams with targeting and shareholder engagement

[Nick Arbuthnott](#), managing director, European research, Ipreo

9.45 am **Governance goes mainstream**

- Should IROs be opening up dialogue between the board and investors? Or conducting a governance roadshow?
- How IROs should communicate their company's strategy as investors and companies debate capital allocation
- Strategies to get the vote you want on governance issues: Common shareholder concerns on governance
- How do fund managers and governance analysts co-operate? Proactively reaching out to governance analysts covering your region/sector
- Beyond basic research: What does the market value the most? Executive remuneration, transparency, timeliness, presence of senior management at investor meetings and roadshows
- Targeting governance-focused investors: Learning their policies, principles and proxy voting guidelines

[Mikkel Skougaard](#), investor relations officer, MOL Group
[Fabio Bianconi](#), director, Morrow Sodali
[Dov Levy](#), VP of IR and corporate development, AKKA Technologies

10.15 am **Morning coffee, exhibition and refreshments**

10.45 am **Sustainability communications: Integrating ESG activity into your IR program**

- Integrating ESG into established IR programs and coping with the surge in investors' interest
- Building your knowledge base and confidence to respond effectively to questions from investors
- Separating ESG risks from opportunities and evaluating factors that will impact a company
- Communicating long-term stability: How to take the focus away from short-term fluctuations
- Applying standard IR disciplines such as investor analysis, targeting and communications to sustainability and corporate governance issues
- Exploring cost-effective ways of communication, including hosting an annual webcast around sustainability performance for analysts and investors

[Kirsty Collins](#), global responsible investment, Aviva Investors
[Antje Stobbe](#), director, investor relations and group sustainability, Deutsche Bank

11.15 am Roundtable discussions

12.00 pm Wrap up of day session and lunch

12.45 pm IR Workshops: Please choose one

| Crisis management Communicating effectively during uncertainty | M&A readiness What to do (or not do!) |
|---|--|
| Join this workshop to learn: <ul style="list-style-type: none">• IR's role in a crisis: What to do and what not to• Being prepared to effectively address investor concerns• Monitoring the market and keeping senior management updated• When to make market announcements? What are investors and analysts looking for?• Minimizing short-term impact and lowering risk of long-term damage• Building confidence and learnings to better manage future situations• Making social media work for you – taking the good with the bad | Join this workshop to learn: <ul style="list-style-type: none">• Doing due diligence on how the market might perceive the transaction• Getting the rationale and metrics right: Anticipating concerns and questions over deal risks• Working with the other firm to ensure consistency of messaging• Following up announcements with one-on-one shareholder conversations• Using digital communications and social media to keep the momentum up• Too much PR: Balancing disclosure while protecting the sanctity of the deal• Adapting to the new world and creating value post-deal |

2.00 pm Wrap-up and end of conference

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