



IR Magazine Conference – Small Cap 2017

September 13, 2017, Fordham University, New York

8.15 am Breakfast and registration

9.00 am Welcome and opening remarks

9.10 am **Macroeconomic briefing: The year in review, year-end predictions & looking into 2018**

- Current investment themes: Equity market trends and how this impacts the thinking of the investment community
- How US policies could impact growth and interest rates: Leading drivers that cause investors to adjust portfolios
- What Trump's approach could mean for investor sentiment and asset allocation
- What to expect in 12 months: geopolitics, oil prices, exchange rates, security issues and more

9.30 am **Investor relations 101: Setting up, elevating an IR program – Are you representing yourself right?**

- What makes effective IR? What works, what doesn't
 - What role IR plays in your company's evolution: Building credibility with the investment community
 - Why have an IR website?
 - Developing an IR team that's right for you; dealing with inquiries, regulations, etc.
 - What makes for a good IR firm? Picking the right partner
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10.15 am Refreshment break

10.45 am **Investor intelligence 1: Q&A with the investment community**

- What are the top questions from investors facing small & micro-cap issuers?
- Making yourself attractive to institutions – targeting tips, which events work best?
- Getting research coverage – best ways to reach the investment community
- Disclosure, access, guidance – what the buy side likes (and what it doesn't)
- Compliance no-nos – what not to do, what puts investors off and transparency
- Critical decisions and inflection points – making key decisions that will impact investments and business value

11.45 am **Investor intelligence 2: Expanding your investor base with high impact targeting**

- Which pool of investors to focus on? Navigating your way through key investment centers
 - Effective targeting – qualifying leads, the right methodology, tools, attracting foreign investment
 - Building confidence and knowledge in the area to respond effectively to CSR/ESG-related questions
 - Role of social media in business development and providing access to funding
 - Managing competing interests among investors and finding a financing strategy that works
 - Improving shareholder access and maximizing your reach. In what instances can face-to-face meetings be replaced?
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12.30 pm Networking lunch

1.30 pm **Sticking to script: Crisis planning, communication and dealing with competition**

- Keeping the CEO on message: How to deal with senior management veering off script
- How to make a big statement as a small firm on a shoestring budget: Building a business that instills confidence
- Communicating what drives value effectively in an uncertain market – building your story internally and externally
- Budgeting for IP protection vs. everything else – what is the cost of competition?
- The questions you need to be prepared for: What not to do when communicating performance
- Navigating sticky situations: How effective is your crisis management and press policy when things go wrong?

2.15 pm **Digitisation of IR: Using social media and third party tools to differentiate your business**

- Trend watch: The increasing digitization of IR communications, and how to stay ahead
- Creating short, sharp digital content and online stories to increase investor engagement
- Benchmarking and measuring effectiveness of your website, social media communications, reports, webcasts, etc.
- Using social media to differentiate your business: Important tools and digital marketing strategies to attract funding
- Choosing the tools that are right for you – what eases the pressure on time?

3.00 pm Best practice from award-winning IR professionals at small cap companies

- Practical insights from a practitioner – what makes for good IR?
 - Doing more with less – what to stop doing, what adds value, budget best practice
 - Managing growing pains as your organization evolves and adapts to new demands
 - Attracting board members who are aligned with your vision and grow with your company
 - Building long-term relationships with stakeholders who will play a key role in your success
 - Keeping stakeholders informed through the good and the bad – providing value with the bigger picture in mind
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3.45 pm End of discussions

4.00 pm Drinks reception
