

2022 – Best IR Communications and Engagement Programme

Categories: *Small-, Mid- and Large-Cap Listed Companies*

IR Principles

Please note that for all awards categories, companies need to emphasise how they have successfully addressed the following IR principles:

- Having an equity story and investment case that are clearly communicated across all stakeholders and deliver the company's long-term value creation
- Engaging with investors, analysts and other relevant stakeholders with the depth, transparency, and regularity to enable their fair assessment of the growth and value drivers of the company
- Meeting or exceeding regulatory requirements around disclosure and focusing on greater transparency of information on material risks, challenges, progress and milestones both internally and externally.

Award Description

For this award judges will be looking for evidence of effective implementation of an IR communications and engagement programme, that both reflects and supports the company's purpose, vision and strategy.

The IR strategy should include and be supported by the following elements:

1. A consistent and compelling investment proposition, underpinned by a clear and realistic strategic plan.
2. Regular, consistent and transparent financial and non-financial disclosure of the company's performance against its strategy and milestones (Annual Report, presentations, webcasts, transcripts, Q&A, historical publications, Ad Hoc releases, regulatory news, trading updates), accompanied by a Financial and Event Calendar with relevant links and information to enable easy access.
3. Regular, proactive and transparent engagement with equity analysts to inform a fair company assessment and accurate guidance.
4. IR engagement and outreach strategy with existing and new, institutional and retail investors, including roadshows, site visits, product launches and other events.
5. A website that conveys a clear, substantive and timely picture of the company and serves as an interactive platform for delivery of its financial and wider material disclosure related to the company's long-term value in society.

Along with an entry statement, contestants are encouraged to submit supporting materials.

Best IR Communications and Engagement Programme will focus on, but not be limited to, the following:

Roadshows and investor meetings	Investor factsheets
Investor presentations	Capital markets days
Corporate websites	Site visits
Use of video and real media	Other supporting investor materials /data
Investor events	CEO/CFO earnings summary
Product launches/updates	Use of social media

AWARD CRITERIA

Introduction

Please provide concise but insightful answers to each of the questions below, keeping in mind the IR principles and the individual awards description and considerations, paying particular attention to what the judges are looking for. It would be helpful if you could highlight what you have done differently and, most importantly, any evidence of success.

Overview

1. What are the key objectives for your IR communications and engagement programme, and how do these align with and support the company's strategy and purpose?

Strategy & Approach

1. What are the principal elements of your IR communications and engagement programme?

2. What channels do you use, and how do you achieve consistency across these channels (e.g. annual report, website, capital market days, presentations, site visits)?

3. What processes are in place to obtain market feedback and how does it help shape your investment case?

4. How do the company's various internal teams and departments work together to achieve its IR objectives (e.g. Board, executive committee, strategy, finance, sustainability, comms)?

Outcomes

1. Outline the KPIs of your IR Communication strategy and demonstrate how you have you performed against them? This could be supported by quantifiable evidence, demonstrating the success of your strategy. For example, have you seen an increase in investor engagement interest, sell-side coverage or media coverage; increase in trading volume and share price resilience; a change in investor feedback, rankings and awards, securing investment from specific tiers/geographics or diversification of shareholder register?

2. What improvements/adjustments have you made recently in your IR engagement strategy which were inspired by prior investor feedback?

Alongside your submission, please include a hard copy of any material or link to any relevant material to support your entry.

Please note Small-cap, Mid-cap and Large-cap criteria will be comparable to FTSE 100, 250 and Small-cap/AIM market cap sizes as at 31 March, 2022.