

Actions for Companies

that Investors value most

Practical actions to improve the efficiency and effectiveness
of your Investor – Company dialogue



THE INVESTOR FORUM

Top 5 actions to improve the **EFFECTIVENESS** of dialogue

1. **Determine the purpose of any meeting** - information gathering, investment decision-making, strategic or thematic engagement and investor expectations in terms of attendee.
2. **Avoid unnecessary complexity** in reporting by providing clear summaries and linkages and present information in various formats tailored to needs of different investors
3. **Make access easy** - establish a feature on corporate websites for investors to express interest in engaging and to sign up to distribution lists (and maintain a generic contact@plc. com).
4. **Encourage investors** to share questions or topics of interest before the meeting to maximise effectiveness and address specific concerns. Additionally, build in 5-10 minutes for feedback from investors.
5. **Don't be offended** if investors don't engage regularly but ensure that the lines of communication are available and open.

Top 5 actions to improve the **EFFICIENCY** of dialogue

1. **Ensure reporting efforts align with strategic objectives** for coherence and relevance, while emphasising the company's core values and mission. Prioritise demonstrating progress over time. Not every business needs to be the best at ESG.
2. **Understand the specific information needs of the investor**, whether it's financial performance updates, strategic insights, sustainability issues or governance practices.
3. **Communicate with authenticity** and straight forwardness in all interactions to build trust and credibility.
4. **Tailor engagement strategies** by identifying preferred modes of communication with your investors, such as meetings, emails, or conference calls and agree on the frequency and timing of engagements to ensure mutual convenience and effectiveness.
5. **Understand the materiality of issues** within your company and use this understanding proactively to address regulatory requirements.

Other TOP TIPS from investors

“Ensure it’s a **two-way conversation**”

“Always focus on **quality over quantity**”

“Ensure you use the time to **ask investors** what’s missing or that they would want from the communications.”

“Ask for feedback and be ready to **continue the dialogue** where it was left in a previous meeting with concise details about what was achieved/done regarding the issues raised.”

“Understandably (and rightly) companies are very much focused on showing their strengths but when it comes to ESG they should **be clearer on challenges.**”

“Make sure all IR materials are **easily accessible** on the website”

Interested in diving deeper into these insights?

The Investor Forum's latest research provides best practices and lots of practical actions.

Get your hands on the full report to unlock valuable insights and enhance your approach to investor engagement and corporate communication.

<https://bit.ly/3QMGKX6>



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