

# IR at an Inflection Point

The NIRI Chicago Investor Relations Workshop

SEPTEMBER 20, 2024



**8:00 a.m. - 8:30 a.m.** **Registration, Breakfast and Exhibitor Showcase (Main Hallway)**

**8:30 a.m. - 9:15 a.m.** **Understanding Your Stock Price (Grand Century)**

Valuation theory runs the gamut based on industry, company size and other factors. Fully understanding your shareholder base and the metrics prioritized by investors empowers IR professionals to effectively connect with potential shareholders and deliver insights on investor behavior to internal stakeholders.

**Speaker:** [Dennis Alvarez](#), Senior Director of Capital Markets, NASDAQ

**9:15 a.m. - 9:30 a.m.** **Break / Exhibitor Showcase (Main Hallway)**

Network with your IR colleagues and meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.

**9:30 a.m. - 10:15 a.m.** **AI for IR: From Implementation to Execution (Grand Century)**

Join us for a panel discussion on integrating Artificial Intelligence (AI) into investor relations. The panel will feature IT experts who will cover the essentials of secure corporate implementation, alongside industry experts who will share some advanced use cases and practical real-world examples of how AI can expand the capabilities of an IR team.

**Panelists:**

[Jay Krish](#), Head of Digital Transformation, Enterprise Architecture, and Global Innovation Digital Partner, Ingredion Incorporated

[Tim Stahl](#), Chief Revenue Officer, Q4, Inc.

[Jordan Fisher](#), Vice President Business Development, AlphaSense, Inc.

[Chris Weltzer](#), Partner, Portfolio Manager, Balyasny Asset Management, L.P.

[Noah Weiss](#), Vice President Investor Relations and Communications, Ingredion Incorporated

**Moderator:** [Elizabeth Saha](#), Senior Investor Relations Lead, Littlefuse, Inc.

**10:15 a.m. - 10:30 a.m.** **Break / Exhibitor Showcase (Main Hallway)**

**10:30 a.m. - 11:15 a.m.** **Sustainability (Grand Century)**

The backlash against ESG has exposed legitimate stakeholder frustration. A focus on quantity over quality of information has failed to recognize and address issues that truly matter to the business. At this inflection point companies need to set a new course that clarifies what is material to the business and its stakeholders. In doing so companies can meet the needs of the present without compromising the ability of future generations to meet their own needs.

This panel will guide IROs in achieving a balanced approach to environmental stewardship, social responsibility, and economic viability. We will explore strategies for maintaining a strong defense on essential issues while also highlighting the differentiated areas that will stand out to investors.

We look forward to a lively discussion on a topic that most companies and CFOs have indicated will remain a priority for their time and resources.

**Panelists:**

[Megan Lum](#), Global Director, Environmental Programs & Sustainability, Baxter International Inc.

[Eileen Buckley](#), Vice President, Corporate Responsibility, Stryker  
[Brooks Rennie](#), Head of Investor Relations, Byline Bancorp, Inc.

**Moderator:** [Brian Matt](#), Head of ESG, NYSE

**11:15 a.m. - 11:30 a.m.**

**Break / Exhibitor Showcase (Main Hallway)**

**11:30 a.m. - 12:15 p.m.**

**A View from Above: A Fireside Chat with Fortune 500 CFOs (Grand Century)**

Investor communication is a skill that CFO's have learned while being in the investor relations role or as part of their learning curve after being appointed. The methods and objectives of shareholder communication have evolved over time. In this session, we will discuss the goals for investor relations from the CFO perspective, the impact of passive growth on the shareholder base, and the role of technology in investor relations. Additionally, we will explore the career paths leading to the CFO role and how the C-suite's view of investor relations has changed and will continue to evolve.

**Panelists:**

[Dave Barry](#), Executive Vice President and Chief Financial Officer, Fortune Brands Innovations

[Jeremy Heaton](#), Chief Financial Officer, Alight Solutions

**Moderator:** [Joni Konstantelos](#), Managing Director, Riveron

**12:15 p.m. - 1:15 p.m.**

**Networking Lunch (Grand Executive - Buffet Style)**

**1:15 p.m. - 2:15 p.m.**

**Keynote (Grand Century)**

**Speaker:** [Jim Valentine](#), CFA, DBA, managing partner of Analyst Solutions

Jim Valentine is the author of "Best Practices of Equity Research Analysts." He'll share his views on how IROs are often tasked to be "internal equity research analysts" and will address why fundamental analysis and identifying your company's "critical factors" are even more important now, despite the ongoing active to passive shift."

**2:15 p.m. - 2:30 p.m.**

**Break / Exhibitor Showcase (Main Hallway)**

**2:30 p.m. - 3:15 p.m.**

**Shareholder Optimization: Balancing the Shift in Passive and Active Funds (Grand Century)**

A key annual objective for IROs is to facilitate interactions between the management team and a variety of funds to attract new shareholders. With the rise of passive funds and ETFs contributing to a decline in actively managed funds, the challenge of connecting with new investors has intensified. This session will explore strategies to optimize Management's time in engaging with both passive and active funds and will provide insights on how to effectively conduct these meetings going forward.

**Panelists:**

[Brian Leite](#), Vice President Client Services, ModernIR

[Patrick Davidson](#), Senior Vice President Investor Relations, Oshkosh Corporation

**3:15 p.m. - 5:00 p.m.**

**Networking Reception and Prize Drawing (The Park – Outdoor patio)**

End the day with a beverage, appetizers and conversation with your fellow workshop participants. Plus, you could win some great prizes (**must be present to win!**)!