

THE POWER OF IR

IR Planning – Establishing KPIs and Benchmarking your IR Program

Brian Matt, CFA – Director, Corp Solutions, IHS Markit
Michael Miller, CFA – Director, IR Advisory, IHS Markit

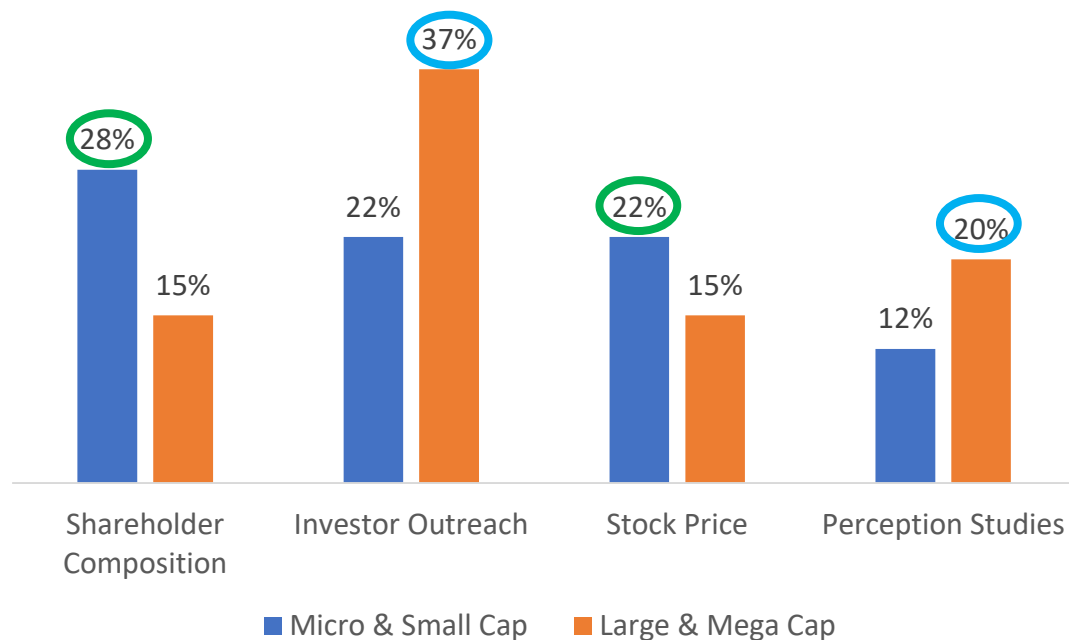


Investor Relations - Goals and KPIs



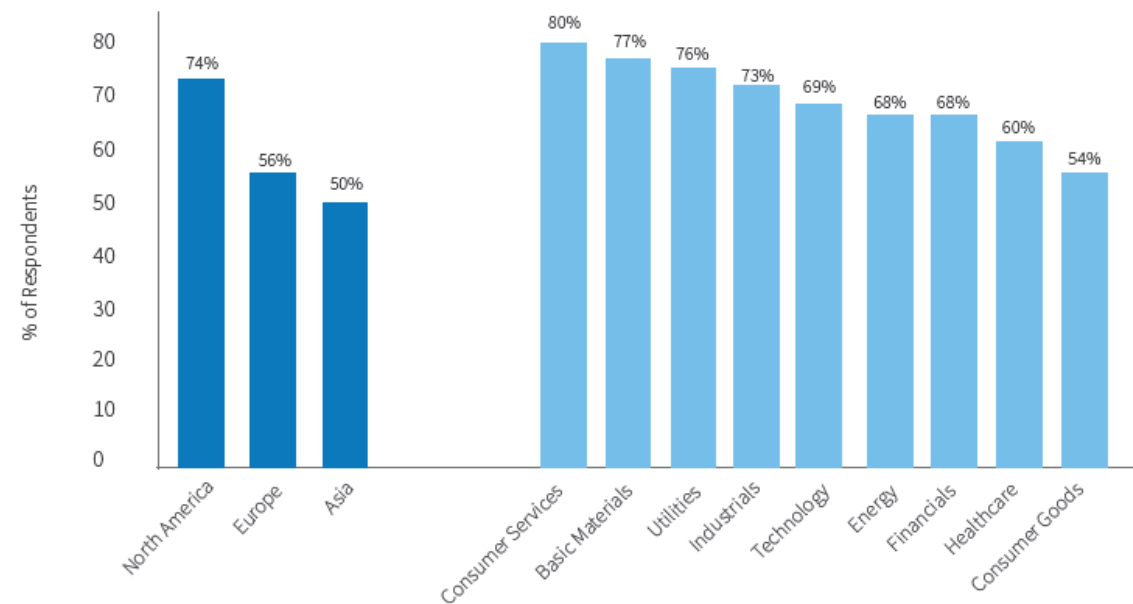
KPIs Vary by Market Cap and Industry

Metrics Used to Measure IR (by Mkt Cap)



*Source: NIRI Measuring Your IR Program's Success Research Report

of respondents that report KPIs to mgmt / board



*Source: Ipreo Corporate Access Survey 2018

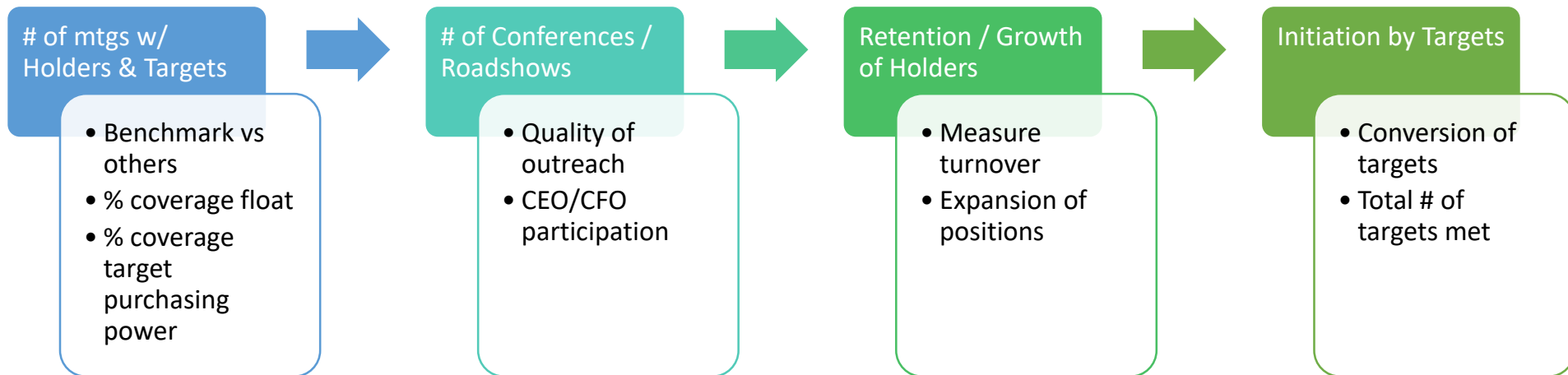
Most Common Categories for KPIs



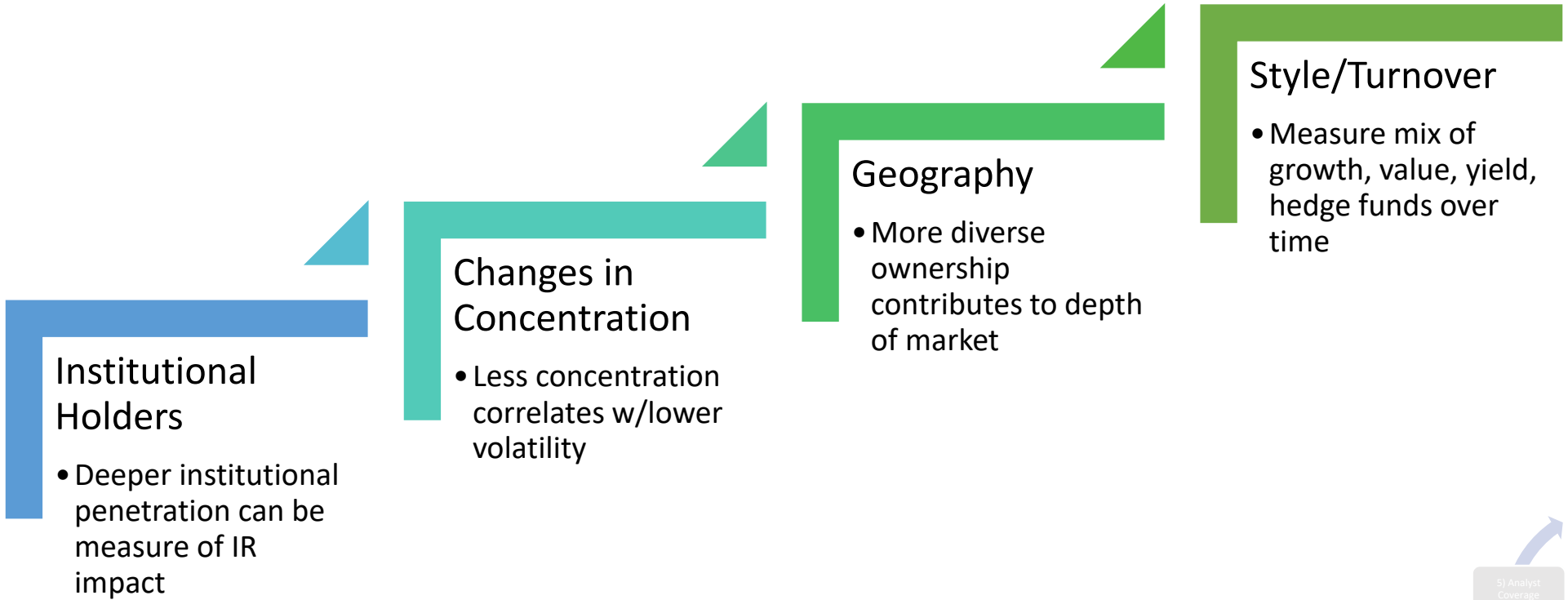
Good KPIs measure *both Process* (fully in IR control) and *Results* (partially in IR control)

*Source: NIRI Measuring Your IR Program's Success Research Report

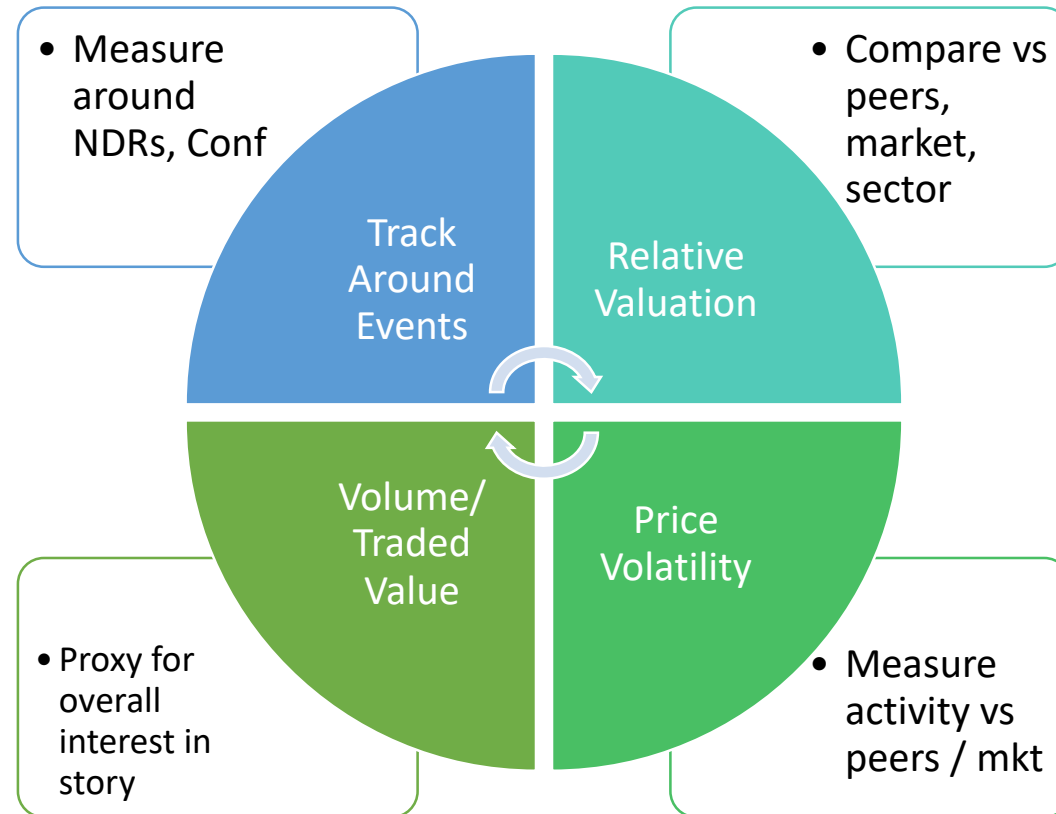
1-Measuring Quality of Investor Outreach



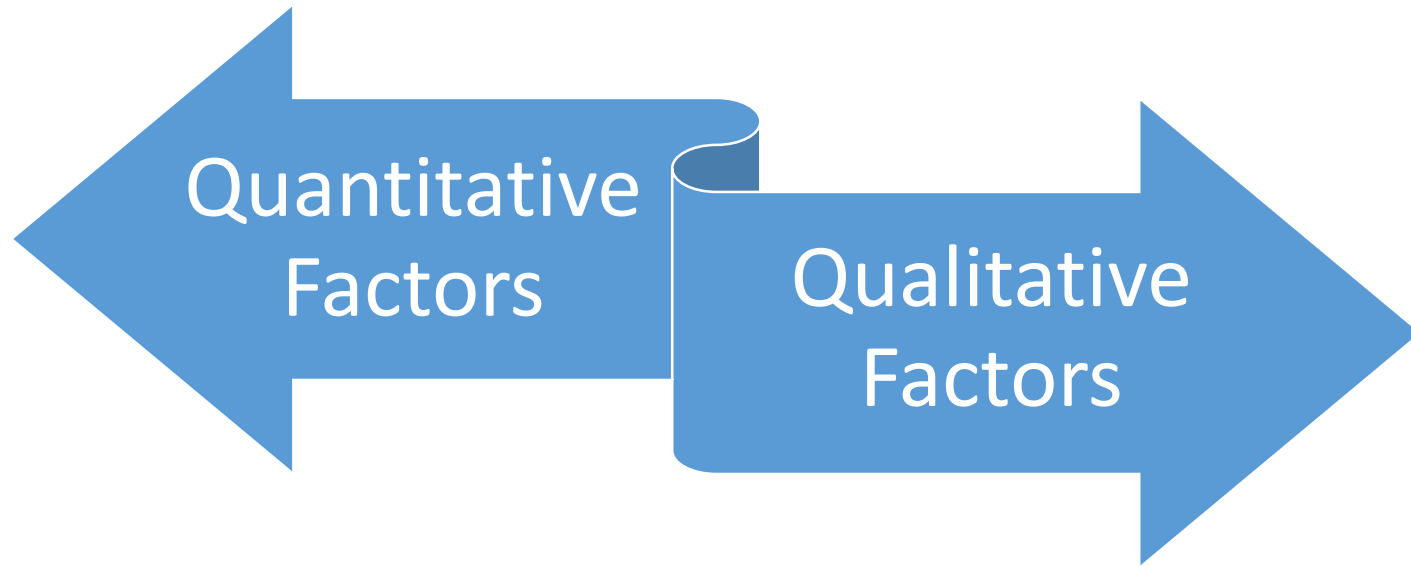
2-Measuring Shareholder Composition/Diversity



3-Measuring Stock Price/Share Fluctuation



4-Measuring Perception Studies/Investor Feedback



5-Measuring Analyst Coverage



Analyst Coverage

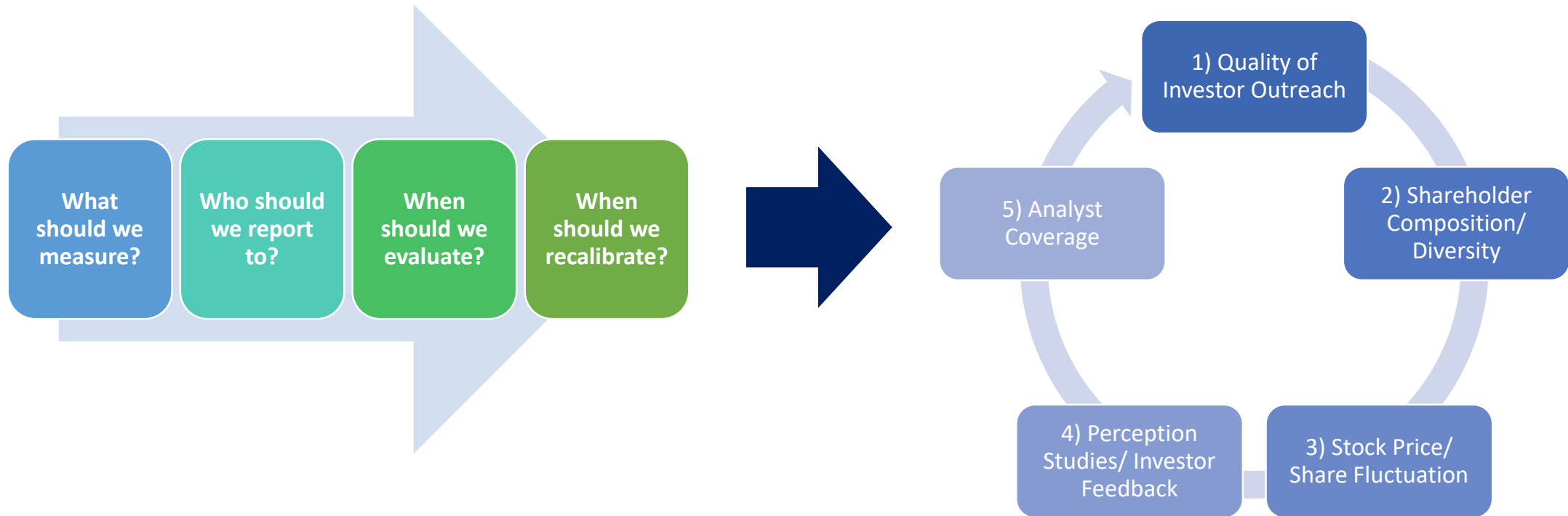
- # of analysts covering story
- NDR allocation
- Conference allocation

Analyst Accuracy

- Consensus reflects guidance provided
- Accurate representation of strategy in reports



Establish a Process to Measure & Report KPIs



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