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The New Rules of Engagement: Investor Relations in a "DIY" World

MiFID II has shifted the paradigm and prompted a growing number of IROs to explore a hybrid - "do it yourself" approach to buy-side engagement.

Be bold

"IR teams need to reach out and not be afraid of a negative response or a non-response. I think they'd be surprised by how many buy-side firms are ready and willing to meet, especially if it's directly from the company to them."
Nick Johnson, Director IR at Coca-Cola

Use a targeted approach

"If a team is doing a roadshow or a headquarter visit and they're trying to proactively target existing or prospective investors, that can go a long way. A lot of the time, we don't hear about visits or roadshows because the banks want to target who they want to target."
Analyst at a $20.0B (EAUM) Growth-Based Investment Manager

Think long-term

"IROs need to get on the phone, identify the person responsible for an investment in their stock and build that relationship over time. There is a lot of change-over on the long-only side, but some people stay there for a while. Find the holders you want and go get them."
Portfolio Manager at a $3.4B (EAUM) Growth-Based Investment Manager

Plan ahead

"The biggest difference for self-directed NDRs is purely logistics. Since you are coordinating your own meetings, the person putting together the cars and reservations is not the person making the trip, making it harder to coordinate in real-time during the meeting days. Test it out on an IR-only roadshow first."
IR Team at Procter & Gamble

The essential "DIY" toolkit

To create and maintain an effective direct engagement program, IROs need new tools for success

Identification and planning

Maximize valuation by identifying the most appropriate investor interactions.

Execution and support

Enhance efficiency by benchmarking IR activities and streamlining event management.

Feedback and measurement

Gain actionable insight with real-time shareholder and market intelligence.

For more information, visit ihsmarkit.com/corporate or email IRinfo@ihsmarkit.com

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