

SUSTAINABLE INVESTOR RELATIONS SERVICES

Support for companies' SRI & ESG communications

Double the impact of SRI / ESG contact; halve the time it takes ...

... through strategy, targeting, message development & interactive communications.

SUSTAINABLE-IR & SRI-CONNECT

www.sustainable-ir.com

An open-access resource hub containing “all a company needs to communicate on sustainability with investors”.

www.sri-connect.com

The research and communications platform for the sustainable investment industry is “where sustainable companies meet responsible investors”. The network is [free to join](#) and can be used by listed companies to identify and communicate with relevant analysts, to distribute sustainability reports, to monitor sustainable investment research, to join discussions and to organise presentations.

STRATEGY & PLANNING

SRI/ESG communications mini-audit – we recommend bespoke practical action plans by benchmarking company activity against global best practice

An SRI/ESG Communications mini-audit delivers for a company a prioritised set of recommendations on how to improve their communications on sustainability to investors – where ‘improve’ is defined by:

- Increased reach
- Improved engagement of ‘mainstream’ financial investors
- Greater efficiency
- Ultimately, a better representation of investors interested in sustainability on the company’s shareholder register

[Full product details](#) | Price: £1,500 + VAT (UK)

SRI communications strategy – we write a plan for you

We will develop a simple strategy that maximises the reach and efficiency of your company’s communications with investors interested in sustainability. After a briefing to understand your current approach, needs and objectives we produce a set of practical recommendations that carry you towards best industry practice.

[Full product details](#) | Price: £1,500 + VAT (UK)

Sustainable investment strategy facilitation – we help you to make a plan

We will facilitate for your investor relations and sustainability teams a half-day planning session that updates you on industry development and guides you through the process of collaboratively identifying priorities and making a sustainable investment plan setting that best meet your company's needs and resources.

[Full product details](#) | Price: £2,500 + VAT (UK)

SR-IR Breakfast Club - share ideas and experiences with peer companies

We host quarterly meetings for groups of companies (typically within the same geography but across sectors that enable them to share, with each other, what works and what doesn't in sustainable investor communications.

[Full product details](#) | Price: Free. By invitation only.

Sustainability message positioning – shape the right message

We will produce a review of the sustainability themes that are likely to feature in sustainable investment research about your company and be raised through your contact with investors. Alongside this, we will give guidance on how best to focus your sustainability messages in a way that will meet the needs of sustainability specialists, address the requirements of activist investors and engage 'mainstream' investors.

[Full product details](#) | Price: £4,000 + VAT (UK)

INVESTOR & ANALYST TARGETING

Register of SRI interest – *target the most suitable investors for your firm*

We will prepare your company for sustainable investor engagement by identifying all of the analysts and portfolio managers that are relevant to your company, detailing their interest levels and enabling you to make direct contact with them.

[Full product details](#) | Price: £1,500 + VAT (UK)

Issue and interest review - *understand what investors are interested in*

We will summarise the sustainability issues that are currently of most interest to SRI/CG investors – both across the board and also focused on your sector and company. We will project which of these key themes are most likely to interest investors and analysts in the year ahead and will give guidance on shaping your sustainability messages to ensure that you address all topics of interest and are prepared for questions that you are likely to be asked. The full review includes investor interviews and benchmarking vs peers. The short review excludes these.

[Full product details](#) | Price for full review: £4,000 + VAT (UK) | Price for short review: £750 + VAT (UK)

COMMUNICATIONS – ROADSHOWS & EVENTS

Sustainability results webinar – *in-depth performance communication*

We will organise a whole-market-facing webinar that ensures that all SRI investors and analysts have heard about your company's sustainability performance in a way that enables you to communicate context and depth; to give investors and analysts time to feed back on their needs and ask questions.

[Full product details](#) | Price: £2,500 + VAT (UK)

SRI-ESG roadshow – *communicate directly and efficiently to investors & analysts*

We will organise and fully manage a virtual roadshow to enable you to present your sustainability exposures and management practices directly to the investors that are interested in these. This work will include the targeting of investors, the issuance and chasing of invitations, the organisation of all logistics, help understanding investor interests, support with messaging – as well as on day management of the event.

[Full product details](#) | Price: £2,500 per day + VAT (UK)

Net Zero fireside chat – *communicate your net zero ambitions & pathway*

We will organise a 'fireside chat' with investors and analysts to help your company communicate its pathway to 'net zero' carbon emissions. 'Fireside chats' are informal alternatives to traditional corporate presentations which are particularly suited to the challenge of 'net zero' as they allow for engaged and in-depth discussion on particular themes. The format may be adapted to other issues / strategic transitions such as 'nature net zero' or 'water neutrality'.

[Full product details](#) | Price: £2,500 + VAT (UK)

Sell-side SRI roadshow – *influence the market influencers*

We will organise a short programme of group and one-on-one meetings to ensure that your company has communicated its sustainability message effectively to the specialist SRI analysts at 'sell-side' brokers whose research is widely influential within the market.

[Full product details](#) | Price: £1,500 + VAT (UK)

Broker briefing - help (& force) suppliers to meet your sustainability needs

If you use 'sell-side brokers' or other corporate access providers without sustainability capabilities for investor outreach, we can prepare (for you to send to them) a briefing note that articulates any sustainability-related expectations (analysts to reach, subjects to focus on etc) that you may have ahead of the event organisation.

[Full product details](#) | Price: £1,000 + VAT (UK)

ESG agency analyst roadshow – *we take control of agency dialogue*

We will organise a short programme of group and one-on-one meetings to ensure you have communicated your sustainability message effectively to the analysts at ESG ratings agencies and independent sustainable investment research providers. This enables you to communicate your exposures and performance within the context of your business rather than on terms set by the agencies; to get to know the agencies and analysts who cover your stock and to initiate a dialogue for more effective future communication.

[Full product details](#) | Price: £1,000 + VAT (UK)

TRAINING AND MARKET INTELLIGENCE

Sustainable investor relations training – *learn to communicate efficiently*

We, via SITA (Sustainable Investor Training Associates) and the UK Investor Relations Society, deliver half-day courses on Sustainable Investment for Investor Relations to help IROs understand current and future trends in sustainable investment and prepares them to target investors, shape messages and organise sustainable investment briefings and roadshows.

[Full product details via SITA](#) | [Full product details via the IR Society](#) | Price: £519 + VAT (UK)

Impact evaluation – *understand your strengths and areas for improvement*

We will establish a baseline of how investor stakeholders perceive your company's sustainability exposures and management practices. We will evaluate the impact of your current SRI communications practices and benchmark those against peers and best market practice to identify areas of potential improvement.

[Full product details](#) | Price £4,500 + VAT (UK)

OTHER

Support for consultants –*back-end support for your corporate client service*

We will help consultants and service providers develop their own support and services for companies - including when their products and services compete directly with ours. We believe that demand for such services is far greater than current capacity globally can handle.

[Full product details](#) | Price: £1,500 + VAT (UK)

Retainer – *whatever you need; whenever you need it*

In our experience, many companies know that they need help but don't know what help they need or when they will need it. To avoid discomfort about using us as a reference point with any questions - no matter how large or small - we offer a retainer programme whereby companies commit to pay for a number of hours of advice and use the contracted time up as and when needs arise.

[Full product details](#) | Price: 2,000 + VAT (UK) for eight hours taken whenever required