

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.

NETWORKS, TOOLS & FREE GUIDANCE

www.sri-connect.com

"Where sustainable companies meet responsible investors"

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.

[Link to www.sri-connect.com](http://www.sri-connect.com)

www.sustainable-ir.com

"Everything that a company needs to communicate on sustainability with investors"

An open-access resource hub containing with overviews, perspectives, resources, FAQs, support & services and case studies on all aspects of effective SustainableIR including strategy & planning, investor & analyst targeting, what to communicate, written communications and interactive communications.

[Link to www.sustainable-ir.com](http://www.sustainable-ir.com)

WBCSD / Redefining Value / Resources

Free-to-air guidance notes on best practices in sustainable investor relations

On behalf of WBCSD, we have written the following guidance notes which are freely-available to companies:

- [Targeting investors and analysts](#)
- [Preparing messages and data for investors and analysts](#)
- [Organizing ESG investor roadshows and capital markets days](#)
- [Guiding the integration of sustainability in intrinsic valuation](#)

[Link to Redefining Value / Resources](#)

STRATEGY & PLANNING

SRI-ESG Communications Mini-Audit

We compare your firm's activities with global best practice to generate ideas for improvement

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: £1,800 + VAT (UK)

SRI-ESG Communications Strategy Development

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: £1,800 + VAT (UK)

SRI-ESG Strategy Facilitation

We work with your team to help you develop your own 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

We facilitate the sharing of ideas and experiences between peer companies

We host quarterly meetings for groups of companies (typically within the same geography or sector) that enables them to share - with each other - what works and what doesn't in sustainable investor communications.

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

Benchmark report: SustIR Webpages

We compare how IR webpages support efficient sustainable investor communications

We benchmark companies' use of their IR webpages to communicate sustainability effectively to investors.

[Full product details](#) | Price: Free

INVESTOR & ANALYST TARGETING

Register of SRI Interest

We identify significant individuals at the most relevant investment firms for your company

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: £1,800 + VAT (UK)

Engagement Essentials report

We describe the ESG / SRI practices of target investors to help you prepare you for contact with them

We will summarise and highlight the aspects of selected asset managers' approach to sustainable investment in a way that will inform and help you prepare for direct engagement with the analysts or portfolio managers at those firms.

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

Investor Sustainability Interest Evaluation: Climate change

We explore and explain the interest in and activity on climate change by your largest investors

We will assess the interest of your largest investors in climate change and the investment actions that they are taking to address the issue. This will help your board members, senior executives and other colleagues understand whether / how actions that you take on this issue will have investment consequences.

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

Investor Sustainability Interest Evaluation: Food, Fibre, Nature & Biodiversity

We explore and explain the interest in and activity on nature & biodiversity by your largest investors

We will assess the interest of your largest investors in nature and biodiversity issues and the investment actions that they are taking. This will help your board members, senior executives and other colleagues understand whether / how actions that you take on this issue will have investment consequences.

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

Bespoke Investor Interest Review

We explore and explain which issues of specific relevance to your company are of most interest to sustainable investors

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.

[Full product details](#) | Price: £1,800 + VAT (UK)

Bespoke Investor Targeting

We identify those sustainability investors that are most likely to be interested in the investment proposition presented by your company

The aim of bespoke investor targeting is to identify those investors - from the universe of investors globally with an interest in sustainability - that are most likely to be interested in the specific sustainability and investment proposition of your company and its market positioning. We will identify these and the individuals at these firms that are most likely to be receptive to contact from you.

[Full product details](#) | Price: £2,400 + VAT (UK)

MESSAGE DEVELOPMENT

Message Preparation and Positioning

We help you shape the best sustainability messages for investors

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)

COMMUNICATIONS – ROADSHOWS & EVENTS

Sustainability Results Webinar

We deliver for you the most efficient way of updating all investors and analysts on your sustainability exposures and practice

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

We facilitate this efficient way for you to communicate your sustainability performance directly 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)

Broker Briefing

We provide guidance to help your brokers maximise the efficiency of sustainability

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: £1,200 + VAT (UK)

ESG Ratings Agency Briefing Call

We enable you to shape the way ESG rating agencies assess your company by creating the chance for you to brief them fully

We will organise a focused briefing for analysts from ESG ratings agencies and specialist sustainable investment & corporate governance research firms to give you the opportunity to present your sustainability exposures and practices in a way that sets your activity within the context of your business operations and the realities, practicalities and priorities of the markets in which you operate

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

ESG Ratings Agency Roadshow

We organise a roadshow to enable you to explain your business and sustainability to ratings agency analysts

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)

Sell-side SRI-ESG Roadshow

We organise a roadshow for you to explain sustainability and your business to sell-side analysts

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)

Net Zero Fireside Chat

We organise and host an event for you to communicate your net zero ambitions & pathway to investors

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)

TRAINING AND MARKET INTELLIGENCE

Sector Interest Snapshot

We review the recent sector and issue interest of sustainable investors and research providers globally

Sustainable Investor Sector Interest Snapshots report on investors' interest in the sustainability issues affecting individual stock market sectors identifying the 'most hit' analysis over the previous 12 months and interested analysts at asset managers and research providers.

[Full product details](#) | [Sample report](#) | Price: Free

Sustainable Investor Relations Training

We deliver formal training on developing and executing an efficient sustainable investor communications programme

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)

OTHER

Impact Evaluation

We enable you to measure the impact of your sustainable investor communications in a way that's aligned with your mainstream investor communications

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 £4,000 + VAT (UK)

Retainer

We deliver whatever combination of information, guidance, support or services you need to deliver an efficient and ongoing sustainable IR programme

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) per day

Support for Consultants

We provide back-end support for consultants enabling them to provide sustainable IR services to their corporate clients

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) per day