New York Minute

January 2023

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Sprint to Start the Year

January is typically a dynamic one for IROs - coming back from the holidays (hopefully) recharged, setting new strategic initiatives for the year, and reviewing them with your management team. Closing last year's books and finalizing 4Q earnings while working with your team on what you'd like to say about the year ahead, a task made difficult by these ever-changing market conditions. Combine all of this with the growing calendar of conferences, NDRs, and investor dinners… it feels like we may blink and be in June before we know it.

Before we fast forward, here are a few items catching many IROs' eyes during this earnings season. Late last year, the SEC updated its guidance on non-GAAP measures, adding to the burden that faces many IROs and their financial reporting colleagues in the midst of their year-end closes. This summary from Ropes & Gray highlights the changes and provides guidance on how to avoid labeling Misleading Non-GAAP Measures.

In case you missed it, we held our Consensus-on-Consensus event on January 11th, a timely event given where we are relative to earnings season. NIRI NY board member Greg Lundberg hosted a panel consisting of representatives from investor relations, the sellside, and

UPCOMING EVENTS

SAVE THE DATE: Tues, 5/16

- **ESG programming**

See entire calendar

WELCOME NEW MEMBERS!

- Francesca Filandro, BuzzFeed
- Alan Oshiki, H/Advisors Abernathy

PARTNER PERSPECTIVE - RIVEL

Investor Messaging – Eyes on the Long-Term

The first quarter of this century has been replete with shocks to the equity

the buyside for a fantastic conversation.

The consensus of the night was that there is none (or, it depends!). With media outlets, sellside analysts, buyside participants, and companies utilizing different sources that include – or exclude – various data points and sellside firms, something as simple as categorizing an earnings print as a beat or miss becomes unnecessarily complicated - with significant capital market implications.

As we look ahead to spring, your NIRI NY board is already hard at work on our May programming event, which will be focused on the constantly evolving topic of ESG. With the backdrop of a more challenging economic environment and given the recent politicization of ESG, how are IROs and their management teams prioritizing key messages and deciding how vocal to be or how much to lean in on key ESG topics? Mark your calendars for May 16th and get excited for a nuanced and engaging discussion.

This month's Member Spotlight highlights Emily Mohr, VP, Investor Relations, Sloane & Company, and NIRI NY Nextgen President. Emily shares some sage advice for her peers and an enviable zest for life! Although the NIRI NY community has known Emily for many years, we guarantee you'll learn something new!

To catch-up on anything that we may miss and stay in touch with fellow IROs who are trying to accomplish the same thing, we encourage NIRI NY members to utilize our message boards / forums to discuss topics that are on your minds! Also, as a reminder, NIRI National has opened registration for the annual conference, which will be held over June 6-8, 2023, in Chicago!

As always, I would encourage you to stay connected with the NIRI NY chapter by following us on Twitter, LinkedIn, and checking out the latest information on our website.

markets – the dot-com crash coupled with the 9/11 attacks, the housing bubble and ensuing Great Recession, and the coronavirus pandemic. Each sent the investment community scurrying for safety and seeking reassurance about issuers' financial wherewithal to survive. During each crisis, the usual order of criteria driving investment decisions was disrupted with balance sheet strength, cash flow reliability and margin sustainability rising rapidly to the top of portfolio managers' priorities, superseding the prudent attention typically accorded to strategic agendas that set a company's course for years to come.

To read more on investor messaging from Rivel, click here.



Best,
MaryKate McGilley
President, NIRI New York Chapter
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Find us here: NIRI NY Board and NextGen Committee



Member Spotlight

We highlight Emily Mohr, VP, Investor Relations, Sloane & Company, and NIRI NY Nextgen President for our Member Spotlight this month. Below are a few snippets from our conversation. The complete profile can be found here!

"The opportunities and people meant for you will always come to your life naturally. You can't force it."

"I made the reverse transition to the agency side to experience a wide variety of industries. I think it's unusual that I have such deep experience on the in-house and finance side, making me a better partner for my clients as I have been in their shoes."

"These days I still dance as a personal passion and am a great supporter of the arts."

Please let us know if you'd like to be featured in the **Member Spotlight**.

NIRI NextGen

NIRI NY NextGen is hard at work planning its first event of 2023! The committee looks forward to putting together an educational event for our members to network and learn more about the industry through a conversation with current investor relations professionals. More information to follow!

If you are interested in helping the NIRI NextGen committee or have program ideas, please contact Emily Mohr, President, NIRI NY NextGen, at nirinextgen@niriny.org.

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