New York Minute

April 2024

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SEISMIC SHIFTS

Dear NIRI NY Members,

As we delve into April, the financial landscape has been marked by choppiness and a rate outlook that remains murky at best. Also, we draw parallels between the earthquake in New York and the Eclipse, as well as reasons to sign up for the 2024 Annual Conference and cutting-edge developments in AI impacting buy-side practices.

Earthquake rattles New York and the Eclipse

The unexpected tremors that rocked New York sent shockwaves through our community, prompting reflection on preparedness and resilience in the face of natural climate events. Despite the rarity of such seismic activity in the region and thankful lack of damage, the incident serves as a stark reminder of the importance of contingency planning and risk management in our operations.

Simultaneously, celestial enthusiasts were treated to a rare event - the Eclipse. While captivating the world with

UPCOMING EVENTS

May 15 -In Person Event: Beyond the Numbers: Exploring Market Dynamics and Compensation Trends (5:30 -8pm) @ 1460 Broadway, 17th Floor

Register here!

May 22 - New member breakfast (Details to follow)

June 9-11 NIRI Annual Conference in San Francisco

Register here!

June 25 -June 26 Capital Markets Essentials (Two, 2-

its brilliance, the event serves as a metaphor for the cyclical nature of markets and investor relations, symbolizing the dynamic and ever-changing nature of the financial landscape. Just as the moon temporarily obscures the sun's light, challenges and uncertainties may cast shows over a company's performance and outlook. Effective communication and transparency between companies and investors can help dispel concerns and illuminate the path to success. As we navigate through these fluctuations, let us draw inspiration from the Eclipse's beauty and adaptability, embracing change as an opportunity for growth and innovation.

NIRI 2024 Annual Conference Overview

The NIRI 2024 Annual Conference promises to be a pivotal event, bringing together industry leaders, experts, and practitioners to explore the latest trends, challenges, and opportunities shaping investor relations. From insightful keynotes to interactive workshops, the conference offers a unique platform for networking, learning, and collaboration. Attendees can expect engaging discussions on topics ranging from ESG integration to digital transformation, providing invaluable insights to navigate the evolving landscape of IR.

For a comprehensive overview of the NIRI 2024 Annual Conference, visit NIRI Annual Conference Overview. I hope to see you there! I also want to congratulate our recently announced 2024 NIRI Fellows. The NIRI Fellows Program recognizes distinguished NIRI members who epitomize the leadership, integrity, involvement and IR knowledge to advance the IR profession. NIRI fellows are called to continue service as leaders, mentors and ambassadors of NIRI. You can view the full list here and NIRI will honor the 2024 class.

AI in Buy-Side Practices

In the realm of buy-side practices, the integration of artificial intelligence has revolutionized investment strategies, enhancing efficiency, and unlocking new

Hour Live Virtual Sessions)

Register here!

See entire calendar

WELCOME NEW MEMBERS!

- Jason Fooks, **Brookfield Asset Management Ltd.**
- Jennifer Hollander, **FedEx Corporation**
- Thomas Baumann, **FNK IR**
- Chesca Dizon, **McGraw-Hill Education, Inc.**
- Jimmy Xia, **Perfect Corp.**

PARTNER PERSPECTIVE

DFIN (Donnelley Financial Solutions)

This month's Partner Spotlight features DFIN (Donnelley Financial Solutions), a leading global provider of innovative software and technology-enabled financial regulatory and compliance solutions. Their recent white paper: "CFO's and Controllers Know – The Journey

avenues for alpha generation. Stefanie Mollin, global equities portfolio manager at GIB Asset Management, highlights the evolution of AI in her investment process, from optimization models to the direct integration of NLP algorithms. Leveraging AI-powered tools such as ChatGPT and Microsoft Copilot, Mollin underscores the role of technology in streamlining data analysis and decision-making.

Read more about Stefanie Mollin's insights and other industry experts' perspectives on AI in buy-side practices here.

More importantly, as AI continues to reshape the investment landscape, IR teams are urged to embrace innovation and adapt their practices to meet evolving investor demands. From keyword optimization to maintaining brand sentiment trackers, the adoption of AI-driven strategies offers IR professionals a competitive edge in navigating the dynamic market environment. By leveraging AI tools to enhance communication, monitor sentiment, and anticipate investor inquiries, IR teams can effectively engage with stakeholders and drive long-term value creation.

Membership Spotlight

This month's Member Spotlight **Ron Schneider**, who has been a member of NIRI NY for 29 years and previously served on the NIRI NY Board. Ron currently serves as the Director of Corporate Governance Services at Donnelly Financial Solutions (DFIN). Throughout his career journey, Ron has amassed a wealth of experiences, and he's eager to share his insights. Additionally, he's open to offering advice to any member who may seek it.

Stay tuned for more updates and valuable insights from NIRI NY and I look forward to seeing you at the next event!

Towards Mandated ESG Reporting Starts Now!", provides useful guidance on this reporting transition and is available here:

Recent and ongoing sustainability regulations around the world, including the EU, SEC, California and other jurisdictions, will accelerate the evolution of ESG reporting from largely unregulated web-site reports to more standardized data in regulatory reports (primarily the 10-K and proxy), some of which will be made readily comparable and digitized (including XBRL and iXBRL data tagging), and audited.

Given the intense interest by investors in this information and data, IRO's will continue to play a major role, but the compilation, maintenance and reporting of this data will increasingly require a similar level of controls and procedures as are applied to traditional financial data.

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.



All the Best,
Laura Kiernan
President, NIRI New York Chapter
president@niriny.org

Find us here: NIRI NY Board and NextGen Committee



Member Spotlight

Ron Schneider joins us for this month's **Member Spotlight!** Here are a few snippets from our very engaging conversation. Please read the complete profile here!

"For any relationship to endure, both sides need to gain benefits meaningful to them – "heads I win, tails you lose" won't cut it for long."

"I most value those opportunities when a client has an issue or a message that needs communicating in an effective, impactful and memorable way, and I can share how other companies have effectively dealt with the same or similar issues and help them "solve their problem".

"I played Division 1 college soccer followed by a few years in the Cosmopolitan Soccer League (formerly the German-American League)."

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

NIRI NextGen

NIRI NY NextGen is in the process of planning its final event of the season. Be on the lookout for more information and a formal invitation in the coming weeks. We look forward to kicking off summer with all of our members!

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

If you know a potential NextGen member, please reach out to Ailsa Wells (ailsa@getirwin.com).

Your NIRI National Profile Data

Please review/update your profile data (company, title, email, phone number) in the NIRI National portal by clicking here.

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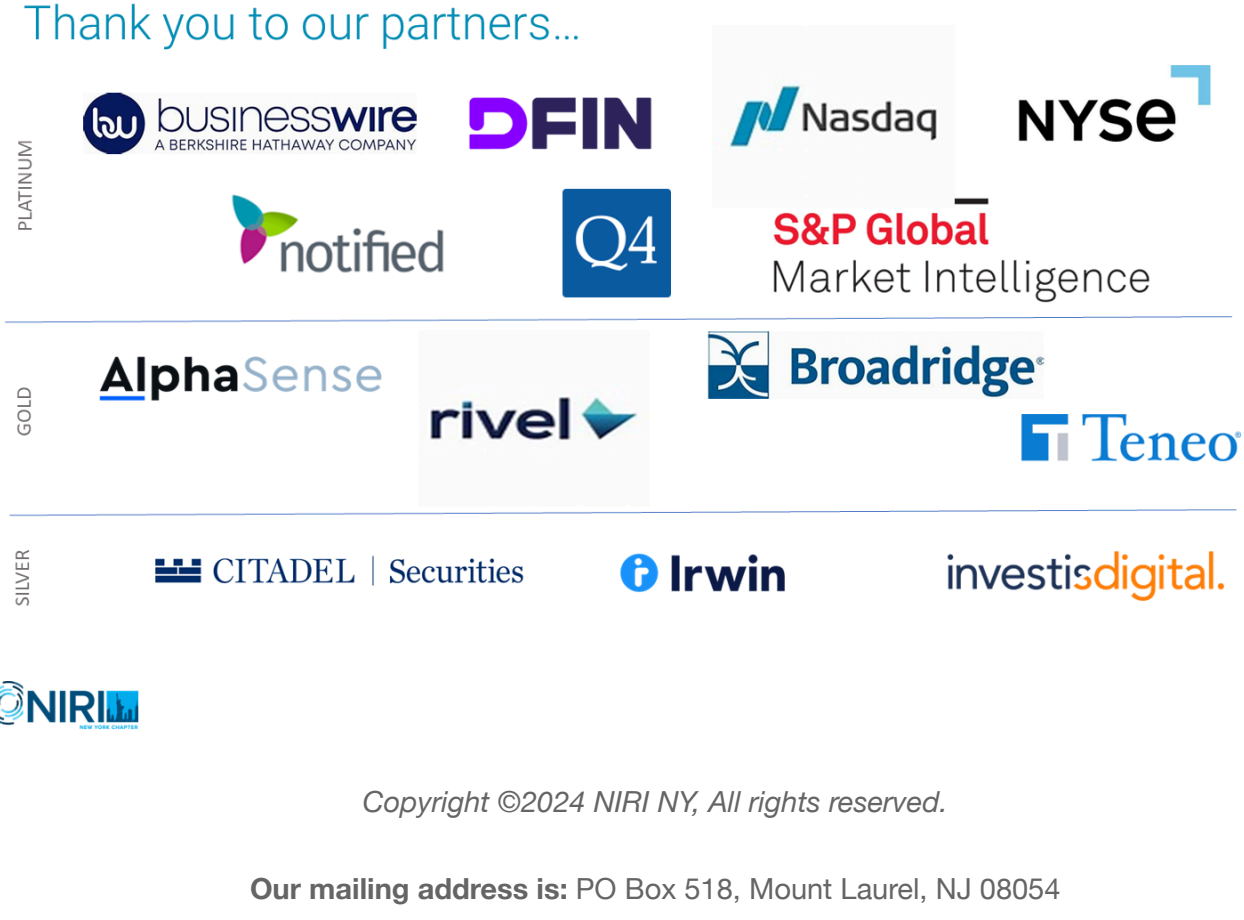

NIRI NEW YORK CHAPTER

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