MERCURY

Strategic Investor Relations for Board-Level Executives

12 – 16 April 2027
Madrid (Spain)



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Introduction:

In today's dynamic financial landscape, investor relations has evolved into a core strategic function that directly influences corporate valuation, stakeholder trust, and long-term organizational success. This Strategic Investor Relations for Board-Level Executives course empowers senior executives with the knowledge and capabilities to build and manage investor relations strategies at the highest level.

The Strategic Investor Relations for Board-Level Executives training course offers a comprehensive understanding of financial communication, capital market dynamics, ESG integration, and regulatory compliance. Participants will explore how to align investor expectations with corporate vision and how to drive value through transparent and proactive dialogue with shareholders.

The Strategic Investor Relations for Board-Level Executives program examines advanced investor targeting techniques and crisis communication protocols to preserve reputation and share price. Participants will learn to optimize their engagement across financial ecosystems, investor communities, and strategic stakeholders. It bridges theory with practical board-level application to equip leaders with the tools to lead investor relations with impact.

Targeted Groups:

This Strategic Investor Relations for Board-Level Executives training targets professionals seeking specialized knowledge and skills:

- Board members are responsible for engaging with shareholders.
- Chief Executive Officers CEOs play a crucial role in managing investor confidence.
- Chief Financial Officers CFOs leading financial communication.
- Heads of Investor Relations departments.
- Executive Directors are involved in capital strategy.
- Senior financial analysts are transitioning to executive roles.
- Corporate strategists and capital market advisors.
- Legal and compliance officers support disclosure obligations.
- Corporate communications and public affairs executives.
- Institutional investors and portfolio managers with governance interests.

Targeted Competencies:

Participants will gain the following competencies during the Strategic Investor Relations for Board-Level Executives program:

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- Strategic thinking for investor relations planning.
- Analytical skills to assess financial reports and market trends.
- Leadership in aligning investor relations with corporate governance.
- Communication skills for high-impact investor engagement.
- Risk management in financial and reputational contexts.
- Decision-making under pressure during investor scrutiny.
- Stakeholder relationship management and negotiation.
- Adaptability in responding to investor trends and ESG focus.

Course Objectives:

Participants will achieve the following objectives by completing the Strategic Investor Relations for Board-Level Executives course:

- Understand the strategic role of investor relations at the board level.
- Identify the interests of institutional, retail, and activist investors.
- Analyze the behavior of financial markets and the sentiment of investors.
- Evaluate key disclosure requirements and regulatory frameworks.
- Formulate investor messaging that aligns with long-term strategy.
- Design proactive investor engagement strategies.
- Interpret financial results and position them for stakeholders.
- Manage investor expectations through effective forecasting.
- Communicate corporate vision using data-backed narratives.
- Assess ESG-related disclosures and non-financial performance metrics.
- Coordinate IR with legal, compliance, and governance functions.
- Utilize digital tools and platforms to enhance IR outreach.
- Prepare for earnings calls and investor briefings with confidence.
- Apply techniques to handle investor concerns and crises.
- Strengthen trust and transparency with the investment community.
- Translate market feedback into strategic inputs at the board level.

Course Content:

Unit 1: Fundamentals of Strategic Investor Relations:

- Define investor relations from a strategic governance perspective.
- Differentiate between tactical and strategic IR functions.
- Explore global best practices in investor engagement.
- Review the role of investor relations in capital market positioning.
- Understand the influence of IR on stock performance and valuation.
- Analyze internal alignment across the C-suite, IR, and board members.
- Study how investor perception shapes business reputation.
- Assess key success indicators in strategic investor relations.

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Unit 2: Understanding Capital Markets and Investor Expectations:

- Examine key stakeholders in the capital market ecosystem.
- Identify the drivers of investor behavior and sentiment.
- Explore equity, debt, and alternative investor profiles.
- Interpret key financial ratios that matter to investors.
- Understand analyst expectations and earnings forecasts.
- Map investor segments and institutional targeting.
- Discuss the impact of macroeconomic indicators on investor confidence.
- Evaluate rating agencies' influence on investment decisions.
- Study market reactions to corporate events and disclosures.

Unit 3: Communication Strategy for Board-Level Investor Engagement:

- Craft a consistent corporate narrative aligned with investor needs.
- Design investor presentation decks and fact sheets.
- Conduct impactful earnings calls and annual investor briefings.
- Master the art of storytelling with financial and strategic data.
- Apply tone, clarity, and precision in shareholder communication.
- Integrate ESG storytelling into investor narratives.
- Align IR communication with corporate branding.
- Use digital IR platforms and investor portals effectively.
- Develop FAQs and talking points for board members to use.

Unit 4: Compliance, Disclosure, and Crisis Management:

- Understand legal and regulatory requirements for IR.
- Review global disclosure standards e.g., SEC, IFRS, ESMA.
- Mitigate risks related to selective disclosure.
- Explore insider trading laws and blackout periods.
- Create frameworks for timely and material disclosures.
- Analyze case studies on miscommunication and market backlash.
- Develop IR crisis communication playbooks.
- Train for media and investor Q&A handling under scrutiny.
- Coordinate responses between the board, IR, and legal counsel.

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Unit 5: Long-Term Value Creation and Investor Engagement Innovation:

- Align the IR strategy with corporate sustainability and long-term goals.
- Incorporate integrated reporting frameworks into IR materials.
- Evaluate investor days, site visits, and roadshows.
- Benchmark IR effectiveness through KPIs and investor feedback.
- Assess the growing role of AI and data analytics in IR practices.
- Implement sentiment analysis and digital monitoring tools to enhance customer experience.
- Strengthen board-level IR dashboards and reporting tools.
- Foster two-way investor dialogue for strategic feedback.
- Plan investor engagement in IPOs, M&A, and restructuring events.

Final Insights & Key Takeaways:

Strategic investor relations are no longer an operational afterthought; they are central to corporate success and stakeholder alignment. This course equips board-level executives with the tools to lead and shape investor engagement with vision, clarity, and strategic intent. By mastering these skills, executives can foster trust, enhance valuation, and cultivate long-term partnerships. Effective IR leadership at the top level ensures a resilient capital strategy and enduring shareholder confidence.