



Essentials of Investor Relations

30 Dec 2024 - 03 Jan 2025
Lisbon (Portugal)



Essentials of Investor Relations

Ref.: 15492_310145 **Date:** 30 Dec 2024 - 03 Jan 2025 **Location:** Lisbon (Portugal) **Fees:** 4900 Euro

Introduction:

Investor relations are the communication of relevant and necessary information by which the investment community can consistently make an informed judgement about the fair value of a company's shares and securities.

The profession of Investor Relations IR has developed rapidly in recent years. Through this course, we aim to provide the key concepts and practices in IR with a range of practical tools, applications, and research. Topics include regulations, compliance, communications, and IR practices.

Targeted Groups:

- IR professionals
- Sustainability and ESG managers
- Board directors
- Communication and PR Managers.
- Financial analysts

Course Content:

Unit 1: Introduction to Investor Relations

- Key Responsibilities and Internal Stakeholders
- External Audiences for IR
- External IR Advisers

Unit 2: Financial Markets

- Global Financial Markets
- Primary and Secondary Markets
- Equity Market Investors
- Debt Investors
- The Growing Importance of ESG Investing
- Other Market Participants

Unit 3: Corporate Entities and Governance

- Legal Definition of a Company
- Share Capital
- Auditors
- Corporate Governance Codes
- Investor Industry Bodies and Regulatory Reviews

Unit 4: Market Conduct

- Market Regulation
- Market Misconduct
- Regulatory Announcements
- Publication of Announcements
- Sponsors, Prospectus and Listings Rules
- Classification of Transactions
- Takeover Panel
- The AIM Rules

Unit 5: Reporting

- Periodic Reports - what they contain.
- Annual Report
- Sustainability / ESG disclosure and non-financial information
 - Appendix I: Leading global sustainability/ESG frameworks
 - Appendix II: Sustainability/ESG materiality and data gathering.
 - Appendix III: Additional information on non-financial and sustainability regulatory disclosures

Unit 6: Accounting, Valuations, and Investment Principles

- Accounts
- Key Financial Ratios
- Financial Modelling and Consensus
- Investment Appraisal and Valuation
- Valuing a Company
- Relative Valuation Methodologies
- Absolute Valuation Methodologies
- Portfolio Theory

Unit 7: Effective IR in Practice

- Managing the IR Program and Annual Cycle
- Shareholder Profiling and Targeting
- IR Engagement - Principles in Practice
- Investor Communications



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Essentials of Investor Relations**

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