



New York Minute

December 2023

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Charting the Course for a Successful 2024!

Dear NIRI NY Members and Friends,

Happy New Year! We hope this newsletter finds you in good health and high spirits as we embark on a new chapter together in 2024. Wishing each and every one of you a strong start to the year, filled with success, growth, and positive developments.

As we reflect on the past year, we can't help but acknowledge the incredible run of the bull market that brought us to an exhilarating close in 2023. The gains achieved were a testament to the resilience and tenacity of the investment community. However, as we usher in the new year, we find ourselves navigating a landscape that has given up some of those gains in the early days of 2024.

The macroeconomic environment remains dynamic and ever-changing, and as investor relations professionals, we must adapt and strategize to thrive amidst uncertainty. It is in this spirit that we invite you to join us for our first event of the year on January 10th. [Register Here!](#)

UPCOMING EVENTS

January 10 – 12:00pm NIRI

Virtual: [Data-Driven](#)

[Storytelling](#)

January 10 – 5:30pm-

7:30pm NYC: [The Year](#)

[Ahead: Best Practices for IRO](#)

[Annual Planning](#)

January 24 - 6:00pm -

8:00pm NYC: Save the date!

The NextGen Committee is

thrilled to announce its

upcoming “Career Canvas:

Unveiling Investor Relations

Roles”

[See entire calendar](#)

WELCOME NEW

MEMBERS!

Event: The Year Ahead: Best Practices for IRO Annual Planning

Date & Time: January 10th, 5:30pm-7:30pm 11 Madison Avenue, NYC

Join NIRI NY for a lively and insightful discussion on setting your IR calendars, agendas, and goals for the year ahead. Our esteemed panelists will share their experiences and strategies on various aspects of this crucial process:

[Jason Fooks](#) - SVP of Investor Relations, Brookfield Asset Management

[Deborah Belevan, IRC, CPA](#) - VP of Investor Relations., Duolingo

[Ravi Jani](#) - VP of Investor Relations, The Real Brokerage

[Hugh Miller](#) - Head of Investor Engagement (East) and Perception (Americas), Nasdaq

Planning and engagement with management teams

- Investor targeting and planning Non-Deal Roadshows (NDRs)
- Conference appearances and making the most efficient use of time
- Communicating and gaining buy-in from management towards IR strategic goals
- Measuring success for your IR team in an unpredictable market
- As we navigate the twists and turns of the market, this event aims to provide valuable insights and practical tips for steering your IR efforts toward success in 2024. Please mark your calendars and stay tuned for more details and registration information coming your way soon.

We're excited to share this month's Partnership Perspective from Rivel, Inc. on AI's Impact on Proactive Investor Relations, [below](#).

Don't forget to sign up for the 2024 Annual Conference in San Francisco June 9-11,2024, register via the link [here](#).

I would like to acknowledge one event from this past year hosted by NIRI's President Matt Bruschi and the VP of Programs of NIRI NY NexGen, Naya Bermudez. Matt

- [Mat Cafarchio, Assurant, Inc.](#)
- [Kristina Leo, Clear Street](#)
- [Lauren Marciano, The Interpublic Group of Companies, Inc.](#)
- [Michael Power, Iris Energy Company](#)
- [Mallory Carlson, Joele Frank, Wilkinson Brimmer Katcher](#)
- [Jackie Harr, S&P Global Inc.](#)
- [Robert Leidl, S&P Global Inc.](#)

PARTNER PERSPECTIVE

[Rivel AI's Impact on Proactive IR](#)

Equity markets have been handed a fair share of challenges to navigate of late, but the rapid rise of Artificial Intelligence (AI) could prove to be among the most daunting as investors and issuers grapple to understand the impact of machine learning on people, processes, and profits.

For Investor Relations Officers, this means they should continue prioritizing human interaction and management engagement, as one-on-one meetings with management remain the most persuasive means for investors to gather insights. The investment community still requires human

and Naya joined the Brazilian Investor Relations Association (IBRI) to deliver the opening discussion panel at IBRI's Investor Relations Week. The conversation focused on communicating macroeconomic effects on company results, developing young talent, and preparing pre-IPO companies to the new ESG regulatory environment. Matt and Naya expressed their excitement to continue strengthening the relationship between the two associations and joining efforts to inform and transform the Investor Relations communities in the respective countries.

And lastly, this month's [Member Spotlight](#) highlights our very own board member **Gregory Lundberg**, SVP – Investor Relations, Omnicom Group, and NIRI NY Board member. Greg joined NIRI NY in July 2011, after transitioning from a career in equity research to Investor Relations. Greg was recently chosen for **Institutional Investor's All-America Executive Team 2024** (Media), so it's clear that his pivot paid off.

Let's kick off the year together, armed with knowledge, camaraderie, and a shared commitment to navigating the challenges that lie ahead. Wishing you a prosperous and fulfilling 2024!

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](#)

interaction to drive the final decision to buy, proving that direct interaction with management is irreplaceable.

In addition to ongoing investor engagement, companies must ensure the quality of information provided on IR websites. While they cannot control how investors utilize AI, they can influence the quality of data sourced by AI by ensuring timely uploads of all financial reports and related materials to their IR websites.

Moreover, it is crucial for corporates to avoid adopting a reactive stance when it comes to AI, especially regarding its influence on investor decision-making. A formal, thorough assessment of the opportunities and threats AI poses to the company can lead to meaningful discussions with investors and enhance the company's overall investment appeal.

Navigating this dynamic landscape will uncover new challenges for IROs as AI continues to evolve. However, one key takeaway remains clear: staying proactive is essential for staying ahead in the investment landscape.



Gregory Lundberg



Joined: July 2011

Member Spotlight

Gregory Lundberg joins us for this month's Member Spotlight! Here are a few snippets from our conversation. Please read the complete profile [here!](#)

“I’ve spent quite a bit of time racing and cruising sailboats which, like IR, involves lots of planning and analysis that can become spectacularly unwound in a moment of crisis.”

“Similar to working inside a bank as an analyst, the IR role also involves close relationships with legal, sales, marketing, finance, product, IT and other parts of the company.”

“Despite my joy in uncovering errors in sellside Excel models, or my prolific Powerpoint charts, I actually majored in Philosophy in college.”

[Please let us know](#) if you’d like to be featured in the **Member Spotlight**.





NIRI NextGen

Save the date! The NextGen Committee is thrilled to announce its upcoming “Career Canvas: Unveiling Investor Relations Roles” panel on Wednesday, January 24th from 6-8pm at the Clocktower in the Edition Hotel (5 Madison Avenue New York, NY 10010). This event will feature various investor relations professionals discussing their individual IR journeys as well as the various paths a career in IR can take you. Be on the lookout for a formal invitation in the new year. We look forward to seeing you there!

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

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