

# IR Planning 2023

EQUITY GROUP  
INVESTOR RELATIONS

In this uncertain and often volatile market, it is vital for public companies to tell their stories in a clear, succinct way while engaging directly with potential investors and sell-side analysts on a consistent basis.

Companies' investor stories need to be refreshed periodically, which can take some time. Likewise, it is important to plan ahead to secure participation in the most productive investor conferences, non-deal roadshows, and perhaps an Investor Day.

## To create an effective investor relations plan:

1. Define 2023 goals, mindful of expected corporate milestones.
2. Identify key target audiences on the buy- and sell-side – these may have shifted due to the company's current story and investment characteristics.
3. Map out investor events, working around earnings timeframes and expected corporate developments.
4. Messaging assessment/refinement should be part of the plan, to ensure the company sets appropriate expectations in the investment community for the coming year, always mindful and building and maintaining credibility.
5. Providing some color on management's longer-term vision should also be part of the plan, otherwise it is challenging to attract institutional investors.

With decades of experience, The Equity Group builds and communicates investment stories, connects companies with investors and analysts, and implements holistic investor relations programs.

**Ready to craft your 2023 IR plan?**

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