

# NIRI Boston Event Weekly

Register Now for Upcoming Events!



## May 2018

### All About Analyst Days

**Date:** Monday, May 21st

**Time:** 5:30 - 6:30 PM - Networking and cocktails  
6:30 - 8:00 PM - Dinner and program

**Location:** Boston Marriott Newton  
2345 Commonwealth Avenue  
Newton, MA 02459

Hosting a successful analyst day that provides meaning and value to Wall Street requires thoughtful planning, attention to detail, and ensuring you have an engaging story to tell. Come hear a panel of IR professionals discuss the elements that contribute to a winning analyst day strategy, as well as potential pitfalls to avoid.

[REGISTER HERE](#)

## June 2018

### NIRI Boston 2017-2018 Season Finale

**Date:** Tuesday, June 19th

**Time:** 5:30 - 8:00 PM

**Location:** The Country Club  
191 Clyde Street  
Chestnut Hill, MA 02467

Come and enjoy a casual evening with your NIRI Boston colleagues in celebration of another good programming year. This year's season finale will take place at The Country Club, located in Brookline. The oldest country club in the United States, it holds an important place in golf history, as it is one of the five charter clubs that founded the United States Golf Association, and has hosted numerous USGA tournaments.

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## New to NIRI Boston?

Are you a new IR practitioner or a practitioner who is new to the Boston area? Try out one of our monthly meetings. The first one is on us! Use promo code NEWBOSTON when registering.

## NIRI Boston Platinum Sponsor



## NIRI Boston Gold Sponsors





Members are encouraged to bring a guest at no cost (please select "NIRI Boston member" fee type when adding a guest on the registration page).

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## Active Replacing Passive: The Reclassification of Index Investors



### A New Line in the Sand Has Been Drawn

Index investors continue to evolve at a noticeable pace, with the latest development resulting in a revised paradigm that emphasizes the active supervision over their investment making-decisions. One-third of the S&P 500 is currently owned by index investors and according to the Investment Company Institute, their growth trajectory does not appear to be waning.

Given the recent bull-run throughout the global markets, index money finds itself in somewhat of a vulnerable position, specifically, over-exposure to several relatively overpriced global equities. This dynamic begs the question - what financial levers can the index community utilize that ultimately allows them to address these risks in the most efficient and effective manner possible?

Index funds are increasingly using ESG (especially, "governance") as a means to voice their opinions regarding the perceived quality of a given corporate's governance framework. ESG represents a core set of values index managers prefer corporates to instill within their planning process and approach to capital deployment. And because an index manager must essentially hold an equity in perpetuity, the ESG framework allows index money to definitively determine whether or not the best long-term interests of the shareholders align with a company's strategic vision.

Index investors should no longer be considered a passive investment style - their respective utilization of ESG and the manner in which they voice their opinion is in fact very active.

How corporates allocate the capital inflows deriving from tax reform will act as an interesting litmus test regarding index managers' focus on how capital deployment reflects a corporate's governance framework.

If any given allocation of "new" capital is not perceived to represent the best long-term interests of the shareholders, the index community will become active within the context of the engagement process - morphing into their own distinct category of shareholder activists.

# Q4

### Recent NIRI Boston Meeting Recaps

Unable to attend a recent event?  
Event recaps can be found by  
clicking the links below.

[When Your Inside Information  
Gets Outside](#)

[Changes in Investor  
Engagement, Are You Ready?](#)

[MiFID II: How New Regulations  
Will Change Engagement With  
Your Investors Globally](#)

[Buyside Perspectives on IR  
and the Future of Active  
Management](#)

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### Connect With Us



[Read Nasdaq's recent report](#) from Dan Romito, Head of Investor Analytics at Nasdaq Advisory Services, which covers the revised utilization of ESG, how large institutional holders like BlackRock are taking the lead at redefining shareholder engagement, and how this combination contributes to a new form of shareholder activism.

#### **About Nasdaq Investor Relations Solutions**

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## **Complimentary Red Sox Ticket Raffle for NIRI Boston Monthly Meeting Attendees**



**Sponsored By:**

**The Proxy Advisory Group, LLC®**

NIRI Boston members attending monthly chapter meetings from now through June will be eligible participants in a free drawing at each of our monthly meetings for two premium seats to attend a Red Sox weekend game. The seats are located atop the State Street Pavillion, providing comfortable seating and a fantastic view of Fenway Park.

## **NIRI Boston IR Mentorship Program**

The NIRI Boston Board is piloting a Mentorship Program, which pairs IR practitioners new to the profession with experienced IR veterans from the NIRI Boston Chapter.

Due to its complex and multidisciplinary nature, new IROs may find the profession confusing and very challenging at first. Through a series of 1x1 meetings and ad hoc support, the program aims to facilitate the transition of new IROs into the role. Mentors act as a confidential source of guidance on both specific IR related questions and general career matters.

At the same time, the program aims to offer mentors a rewarding leadership experience, while providing all participants the benefits of connecting with another colleague in the profession.

If interested in participating, please email [info@niriboston.org](mailto:info@niriboston.org).

## **Apply for a Higgins Scholarship!**

NIRI Boston is now accepting applications for the R. Scott Higgins Memorial Scholarship for Continuing Education in Investor Relations. These scholarships provide recipients with a Body of Knowledge IRC Reference Book and full payment for an Investor Relations Charter (IRC) exam.

**Submissions for the June 2018 exam are currently being accepted on a rolling basis.**

Click [here](#) for further details.

NIRI Boston  
[www.niriboston.org](http://www.niriboston.org)

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