

BROKER BRIEFING

An SRI-Connect product for listed companies

We provide guidance to help your brokers maximise the efficiency of the sustainable investor outreach that they undertake on your behalf

Product details

If you use 'sell-side brokers' or other corporate access providers without sustainability capabilities for investor outreach, we can prepare (for you to send to them) a briefing note that articulates any sustainability-related expectations (analysts to reach, subjects to focus on etc) that you may have ahead of any sustainable investment outreach activities that they .

When you might need this

Companies will typically request a 'broker briefing' ahead of any investor outreach that is being organised on their behalf by a sell-side broker that may not have longstanding experience of sustainable investment or whose services may be enhanced by added reach of specialist focus.

What we do

- Advise on suitable 'sell-side' brokers to organise your SRI or CG roadshow
- Identify relevant 'buy-side' analysts / investors for them to target on your behalf

How much it costs

- £1,200 + VAT (UK)

What we need from you

- Your share-register and any records of recent SR-IR activity
- A short briefing call to understand your objectives from the upcoming roadshow / conference

What we deliver

- A short briefing document to give your selected broker a clear understanding of your expectations

Samples

N/A