



IDEAS FOR COLLABORATING WITH YOUR INVESTOR RELATIONS TEAM

WHAT RETAIL ENERGY & SUSTAINABILITY PROFESSIONALS SHOULD KNOW

To help retail energy and sustainability professionals understand how to interact with investor relations (IR) colleagues, RILA and HIP Investor conducted research including interviews with retailers and investment firms about their roles and environmental, social and governance (ESG) investment criteria.

FIVE IDEAS FOR IMPROVING YOUR RELATIONSHIP WITH INVESTOR RELATIONS:

1. INITIATE COMMUNICATION

Make sure IR knows you are ready and willing to help when they receive ESG-related inquiries. Establishing a relationship with your IR team opens opportunities to informally discuss initiatives and understand their needs and expectations.



2. KNOW YOUR IR AND FINANCE TEAMMATES

Investor Relations typically reports to Finance and the CFO (chief financial officer). IR's primary role is to maintain and grow your investor base, which includes: maintaining relationships with portfolio managers and investment analysts; coordinating shareholder meetings and earnings calls; handling all investor requests for information; and working with Finance to develop Annual Reports. Recognizing Investor Relations' responsibilities will help you to align the descriptions of your work with their primary tasks, creating a more compelling case for inclusion.



3. SPEAK IR'S LANGUAGE

Know how to read financial statements and to use the appropriate ESG integrated reporting techniques to model the possible impact of any energy and sustainability initiative to future cash flows (FCF) and your weighted-average cost of capital (WACC). Build the case for how these initiatives can mitigate future risk by using historical examples from your organization, other retailers, or academic research to connect potential risk factors to material costs.

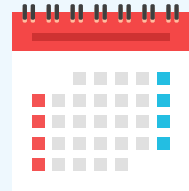




RETAIL INDUSTRY LEADERS ASSOCIATION

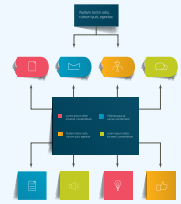
4. PLAN ACCORDING TO IR'S CALENDAR

Key events like quarterly earnings calls, shareholder meetings, and shareholder resolution filing season drive your Investor Relations team's current concerns and availability. Know their schedule to understand when you are most likely to get a question from IR and how you can proactively assemble information investors are most likely to request during those interactions.



5. ESTABLISH AN ESG INFORMATION PROCESS

When providing information for incoming investor inquiries, know the level of detail and format the IR team prefers to see. Track past examples and trends around key ESG topics being raised. You may want to establish an ESG "scorecard" of material metrics to report and track transparent performance with ongoing accountability, much like some companies do for financial performance.



Access even more retail finance resources at www.rila.org/energy.



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