

IR.Manager: principali funzionalità e benefici

 Academy

 Euronext
CORPORATE SERVICES

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Piattaforma CRM

1. Mappatura, facile e intuitiva, dei meetings svolti con gli investitori
2. Possibilità di compilare un meeting memo, riassuntivo dei principali temi discussi, Q&A, eventuali next step concordati
3. Possibilità di generare automaticamente un «Briefing note» dell'incontro, con profilo dell'investitore (su base dati Factset), eventuale holding dichiarato in società e resoconto dei partecipanti/meeting memo

➔ **Un unico «contenitore», facilmente accessibile al team, per creare memoria storica, statistiche e resoconti dell'attività IR**

TUE 21	WED 22	THU 23
		7 Events Mid&small ... gio - gio 6 Events
		Group 1 09:00 AM - 10:00 AM
	OTO EQUITA CAPITAL SGR 10:00 AM - 11:15 AM	Group 2 10:00 AM - 11:00 AM
		Group 3 11:00 AM - 12:00 PM
		Group 4 12:00 PM - 01:00 PM
		Group 5 01:00 PM - 02:00 PM
		Lopez 03:00 PM - 04:00 PM

Supporto all'attività di Investor Targeting

1. Accesso completo al Database Factset con contatti, caratteristiche e stili di investimento dei vari fondi gestiti, holdings dichiarate nelle società Peers individuate
2. Recente integrazione della sezione Sustainability, con Sustainability Rating di Morningstar
3. Team di Customer Service sempre e facilmente reperibile, disponibile per qualsiasi dubbio o richiesta di integrazione

➔ **Un supporto pratico per lavorare sull'incremento dell'Investor Base e per organizzare incontri su tematiche specifiche**

All Investors												Add Filters	Export
INVESTOR	GENERAL INFO				INVESTMENT PROFILE					PORTFOLIO			
Parent	Name	Money Center	Type	Function	Objectives	Country Coverage	Sectors	Style	Target Rating	Turnover	Assets Value (AUM)		
The Vanguard Group, Inc.	The Vanguard Group, Inc.	USA - Mid-Atl. - Philadelphia	Institutional	Buy-Side	-	Germany, South Africa, United States, Singapore ⁺¹³	Process Industries, Energy Minerals ⁺¹⁸	Index	-	Very Low	€6,649,219.00 M		
Taikang Life Insurance Co., Ltd.	Taikang Asset Management Co. Ltd.	CHN - Beijing	Institutional	Buy-Side	-	China	Transportation, Technology Services ⁺¹³	Value	-	High	€4,793,999.00 M		
Aditya Birla Sun Life AMC Ltd.	Aditya Birla Sun Life AMC Ltd. (Investmen...	IND - Mumbai	Institutional	Buy-Side	-	India	Consumer Non-Durables, Producer Manufacturing ⁺⁵	Aggressive Growth	-	Very Low	€3,638,550.00 M		
Wiener Städtischen Wechsels ...	DV Asset Management EAD	BGR	Institutional	Buy-Side	-	-	-	-	-	-	€3,376,352.00 M		

Mailing tool

→ Uno strumento integrato per diffondere facilmente comunicati stampa, aggiornamenti e inviti all'investor base mappata

The screenshot displays a web interface for managing an email campaign. On the left, a sidebar titled "Email Campaign" contains four menu items: "Recipients", "Template", "Content", and "Preview", each with a checkmark icon. The "Recipients" item is highlighted. The main area is divided into two sections. The top section, labeled "Recipients *", includes a "Contacts Lists" search bar with the placeholder text "Type to search". Below it is a "Single Contacts" search bar, also with the placeholder text "Type to search".



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