

To show why and how you can optimize your online communications to drive belief in your investment story. A presentation based on data and observed investor behaviors. It's not rocket science.



Want to hear agood story?

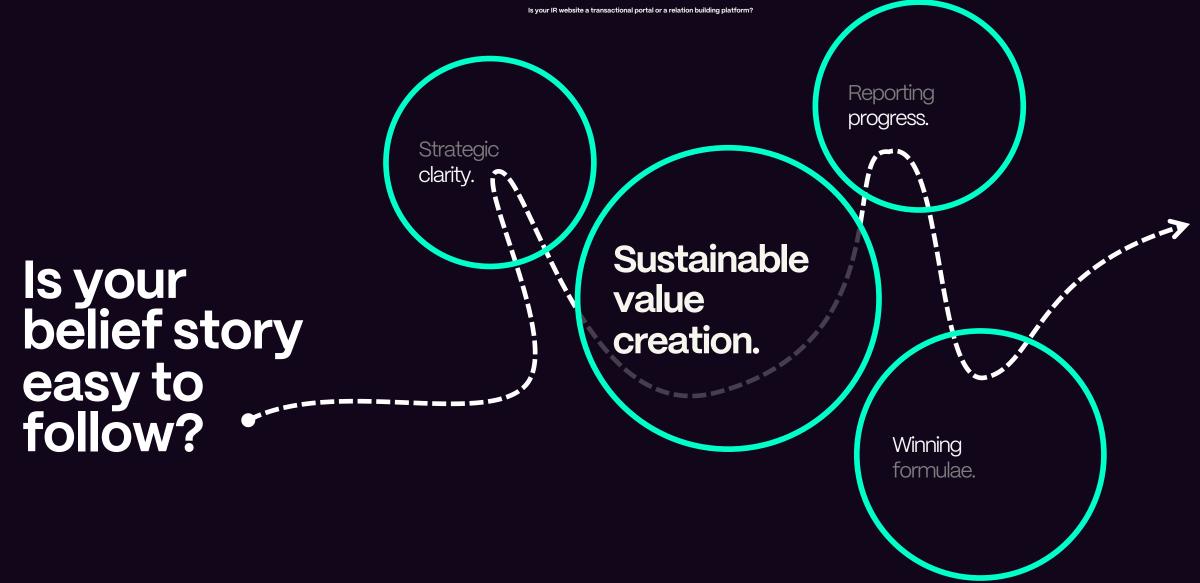
85% of your investors do.

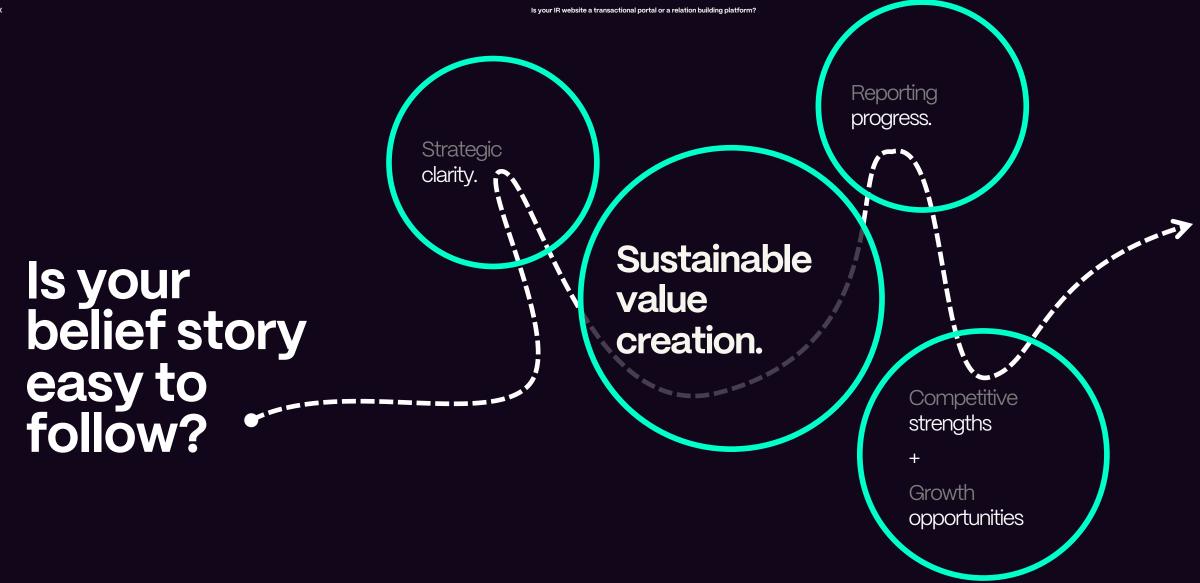
A study by the National Investor Relations Institute found that **85% of investors are more likely to invest in a company that has a clear narrative that articulates investment proposition** (SIX, 2019).



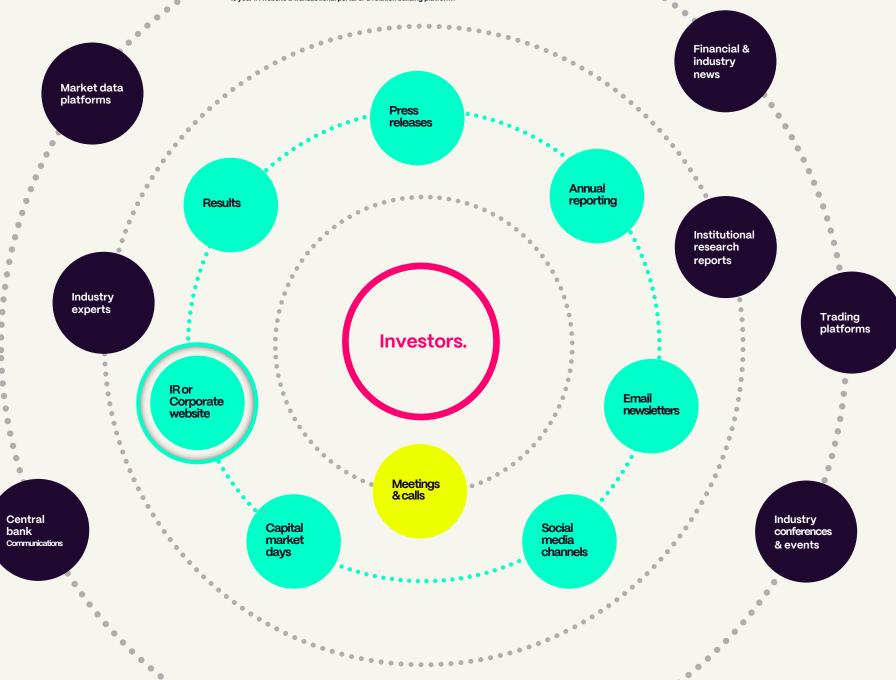
the most important aspect, does the company have a credible plan and the capability to deliver it.

Fund Manager





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Are you taking advantage of your position in the investor information ecosystem?



Are you making the most of onboarding new long-term investors, at the start of their journey?

Deep-dive

due diligence

& forecasts

--> Industry outlook

Multiple in-depth exec &

IRO meetings

→ Management future strategy

Initial analyst

--> Company website

→ Sell side & industry reports

---> Press releases

Limited, call with investor

relations team

review

Are you making the most of onboarding new long-term investors, at the start of their journey?

Limited if any interaction,

probably through investor

conferences

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Uncover

investment idea

--> Consensus estimates

→ Trading information

--> Past financials

Post investment monitoring

- Quarterly performance updates
- --> Outlook shifts



Ad-hoc meetings
Annual management meetings

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Deep-dive

IRO meetings

due diligence

Post investment

Annual management meetings

monitoring

Initial analyst

review

Uncover

investment idea

probably through investor

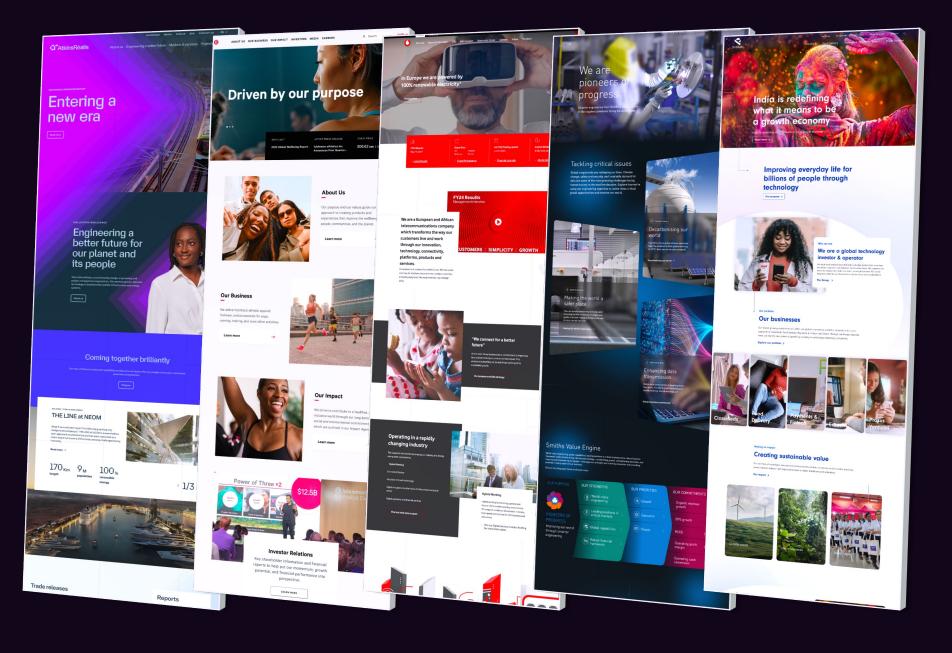
conferences

--> Quarterly performance --> Past financials Company website → Management future strategy updates & forecasts --> Consensus estimates Press releases --> Outlook shifts --> Industry outlook → Sell side & industry reports → Trading information → Management team background Are you making the most of onboarding new long-term investors, at the start of their INTERACTION journey? Limited, call with investor Multiple in-depth exec & Limited if any interaction, Ad-hoc meetings

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relations team

Are you meeting your audiences' expectations with a joined up digital experience?



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The archetypal corporate website

About us → At-a -glance → Our purpose → Our strategy & business model → What we do → Our markets → How we innovate → Where we operate

→ Leadership

Our businesses [brands] [portfolio]

Sustainability → Our approach → Material issues → People → Planet → Product → Supply chain → Reporting

News → News → Insights → Speeches

Investors → Our investment case → Investor events & presentations → Stock & dividend → Financials → SEC filings → FAQs → Analyst coverage & consensus

→ Contacts

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The siloed investment case

About us

- → At-a -glance
- → Our purpose
- → Our strategy & business model
- → What we do
- → Our markets
- → How we innovate
- → Where we operate
- → Leadership

Our businesses

[brands]

[portfolio]

Sustainability

- → Our approach
- → Material issues
- → People
- → Planet
- → Product
- → Supply chain
- → Reporting

News

- → News
- → Insights
- → Speeches

Investors

- → Our investment case
- → Investor events & presentations
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The holistic narrative

About us

- → At-a -glance
- → Our purpose
- → Our strategy & business model
- → What we do
- → Our markets
- → How we innovate
- → Where we operate
- → Leadership

Our businesses

[brands]

[portfolio]

Sustainability

- → Our approach
- → Material issues
- → People
- → Planet
- → Product
- → Supply chain
- → Reporting

News

- → News
- → Insights
- → Speeches

Investors

- → Our investment case
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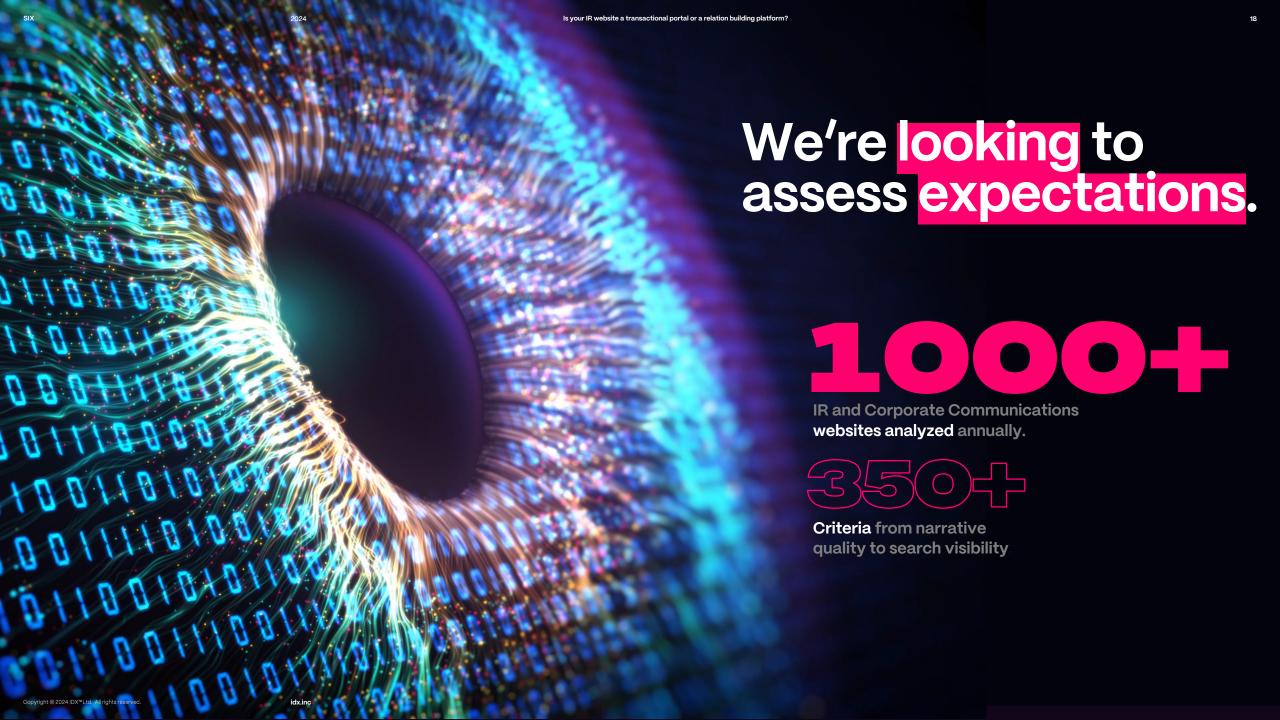
the most important aspect, does the company have a credible plan and the capability to deliver it.

Fund Manager

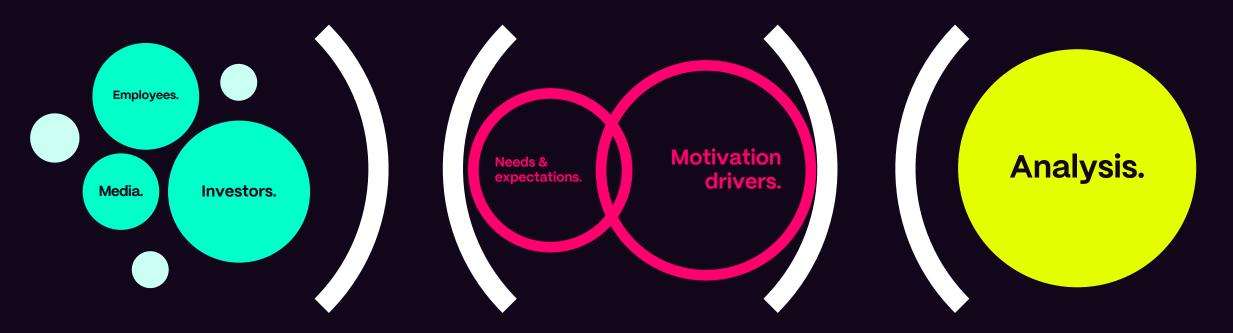


We actively track the needs and wants of the buyside, sell-side and those they listen to.





Corporate website benchmarking for your clients Connect.IQ is a robust, long-standing, unbiased and thorough analysis



Audience perspective.

350+ criteria.

Company score.

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The IQ report card

Measuring performance versus our proprietary best-practice checklist, of over 350 criteria.

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Connect.IQ best online communicators in SMI Expanded



SMI Expanded

Company	Overall	Investors
ABB	67%	68%
Givaudan	67%	64%
Zurich Insurance	66%	61%
Roche	62%	60%
Nestle	62%	60%

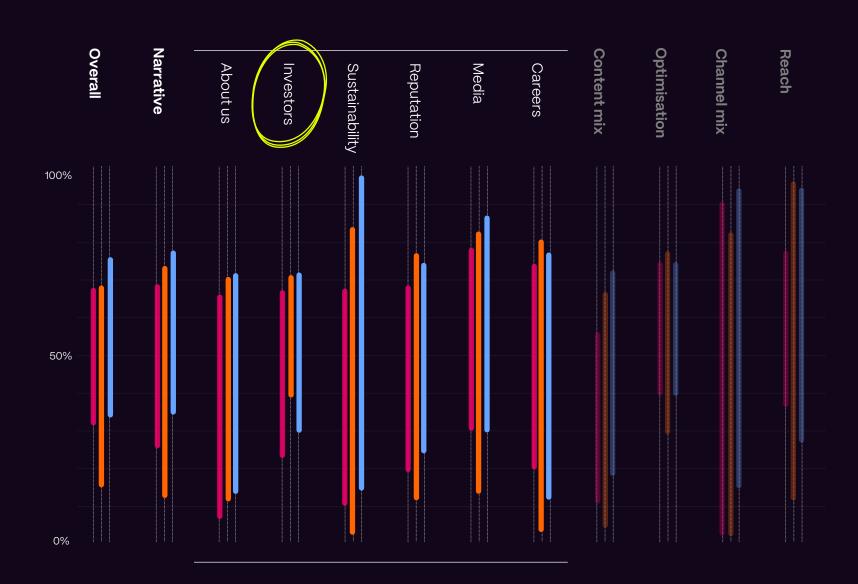
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The best online communicators across the SMI expanded

Overall score		Narrative		Company (About U	s)	Investors		Sustainability	
1 ABB	67	1 ABB	69	1 ABB	76	1 ABB	68	1 Givaudan	67
2 Givaudan	67	2 Givaudan	67	2 Givaudan	73	2 Givaudan	64	2 Zurich Insurance	66
3 Zurich Insurance	66	3 Zurich Insurance	66	3 Sika	64	3 Sika	63	3 Nestle	64
4 Roche	62	4 Sika	63	4 Zurich Insurance	61	4 Zurich Insurance	61	4 ABB	61
5 Nestle	62	5 Nestle	62	5 Clariant	55	5 Nestle	60	5 Swiss Re	58
6 Swiss Re	62	6 Roche	60	6 Nestle	54	6 Roche	60	6 Sika	56
7 Sika	59	7 Swisscom	58	7 Adecco Group	54	7 Swisscom	59	7 Clariant	53
8 UBS	58	8 Swiss Re	56	8 Swiss Re	53	8 Holcim Group	57	8 Roche	51
9 Swisscom	58	9 Novartis	56	9 SGS	50	9 Barry Callebaut AG	53	9 UBS	51
10 SGS	58	10 UBS	55	10 Georg Fischer	49	10 Novartis	52	10 Holcim Group	50

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Connect.IQ best online communicators in SMI, UK and Europe



SMI expanded

Company	Overall	Investors
ABB	67%	68%
Givaudan	67%	64%
Zurich Insurance	66%	61%
Roche	62%	60%
Nestle	62%	60%

FTSE 100

Company	Overall	Investors
BP	69%	70%
BAE Systems	68%	67%
Royal Dutch Shell	68%	68%
Vodafone	67%	70%
Unilever	65%	58%

STOXX 50

Company	Overall	Investors
BASF	74%	68%
Iberdrola	70%	68%
Nokia	69%	56%
Deutsche Telekom	68%	65%
Siemens	66%	56%

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We're watching to identify needs.

7000+

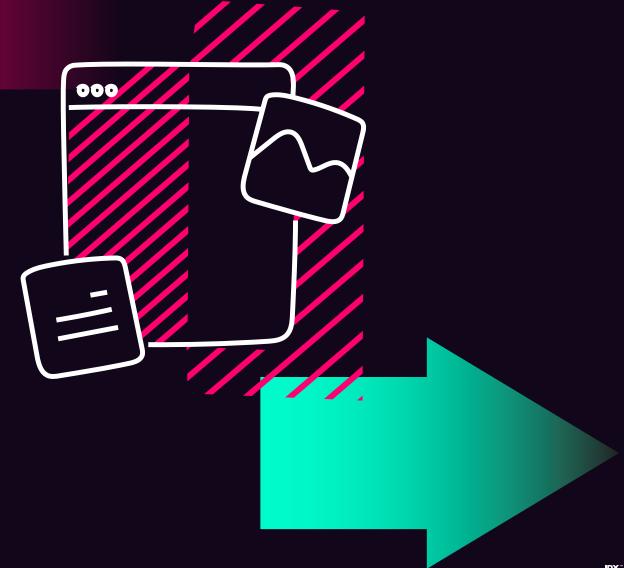
capital market organizations - buyside, sell side & financial media

capital market organization web visits analyzed



Investment community take a broad view.

Investors typically spend as long viewing content outside of the IR section as inside it.



CAPITAL MARKET AUDIENCES

Investor section content top 10.



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CAPITAL MARKET AUDIENCES

Big picture content top 10.



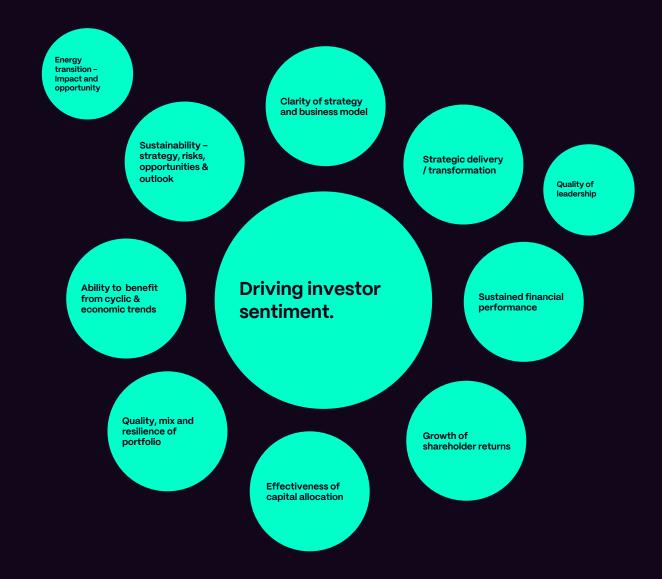
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Investing in content pays dividends.

Rich content is an attention multiplier, with richer content typically viewed up to 5x longer than simpler content.

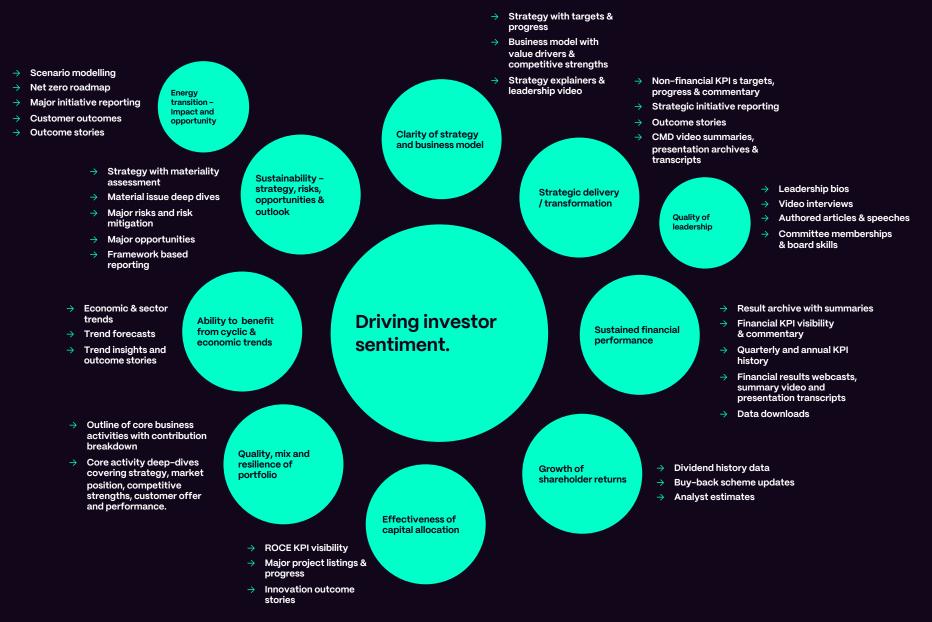


If better content creates better engagement, where should you focus?



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Are you providing the content driving intent online?



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Are you in the we do, or we don't camp?

IDX data covering SMI Expanded

describe their equity story

56% discuss climate change but only 33% have a net zero roadmap **59%** Energy describe their strategy, transition but 80% detail their Impact and opportunity history Clarity of strategy and business model 63% Sustainability strategy, risks, opportunities & explain their ESG outlook strategy, with 48% materiality analysis 17% **Driving investor** Ability to benefit from cyclic & sentiment. economic trends explain their business

model

explain what they do,

but only 49% detail

corporate structure

75% **Sustained financial** performance publish key financial with 40% providing Excel downloads 77% Growth of shareholder returns list analysts but only 41% consensus information Effectiveness of capital allocation

Strategic delivery

Quality of

leadership

/ transformation

89%

provide leadership

biographies and 30% management thinking

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61%

detail capital structure

Quality, mix and

resilience of

& debt

portfolio



From key moments to global imperatives











First impressions

- → IR home & investor section landing page
- --> Investment case

Defining moments

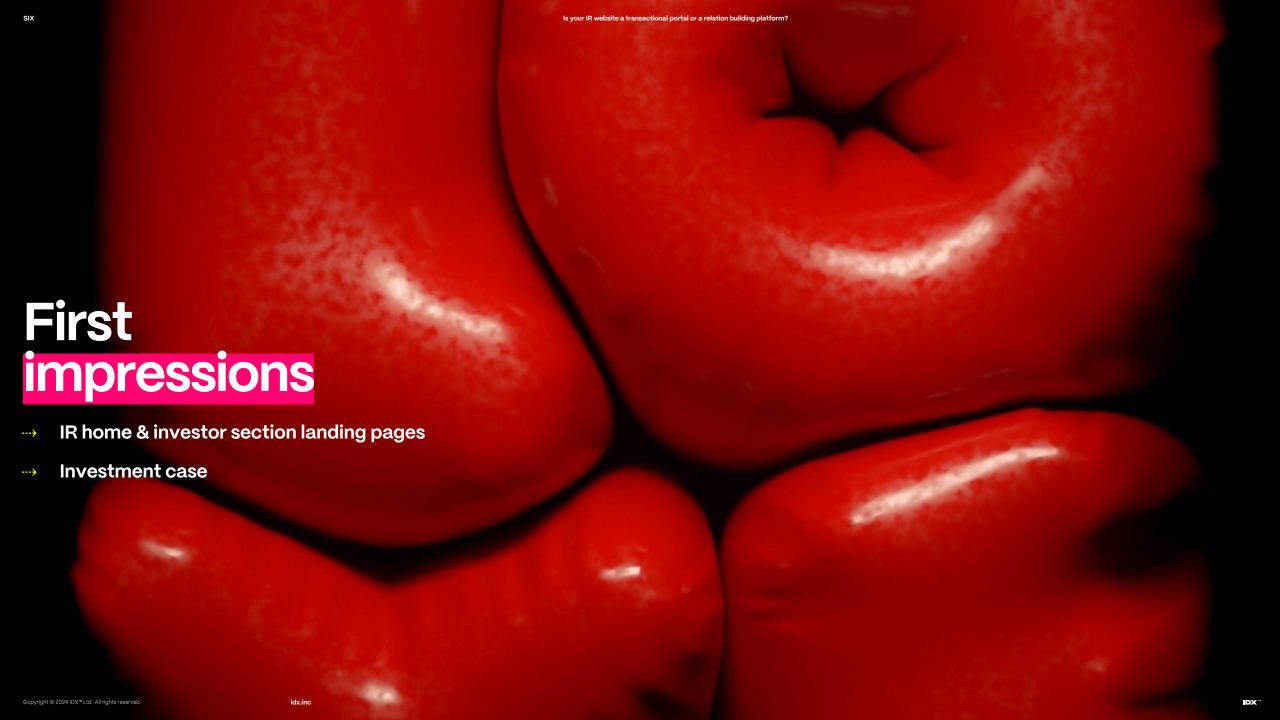
- → Financial results
- --> Annual reporting
- Capital Market Days and Investor Events

Reputational foundations

- --> Strategy & business model
- → Business areas & markets
- → Innovation

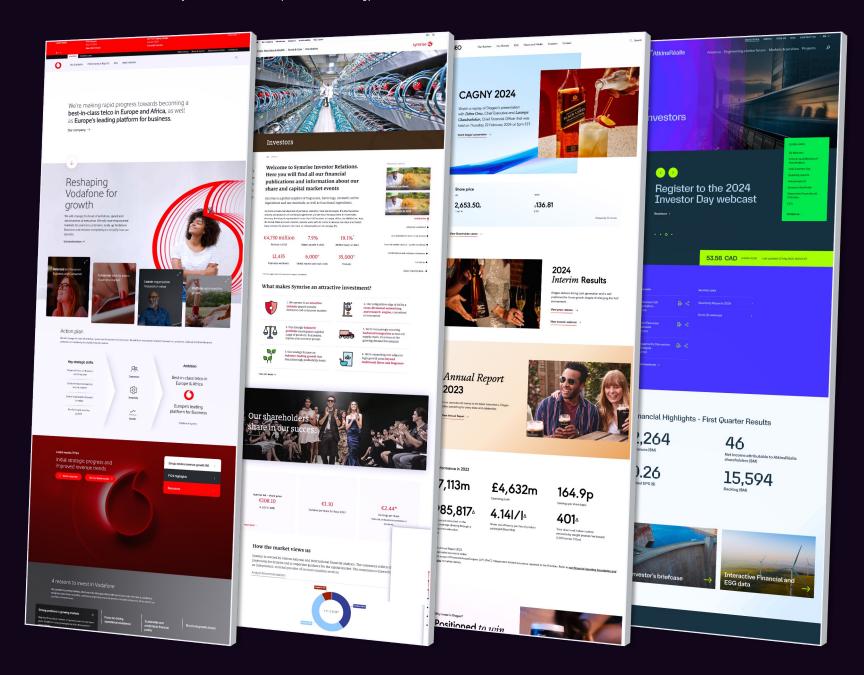
Sustainability

--> FSG for investors

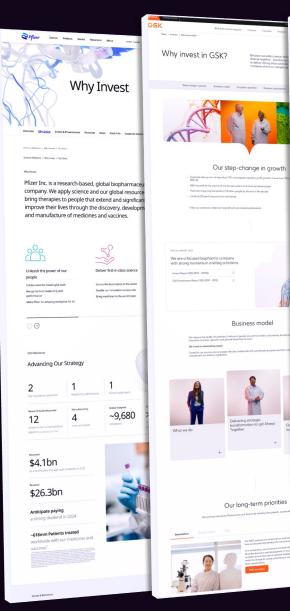


IR LANDING PAGE

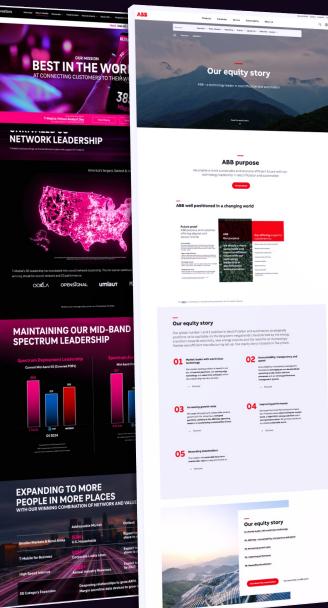
Does your IR home page provide a smooth landing for investors?



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Without an investment case, who's telling your equity story?

23%

of SMI companies have dedicated equity story pages



of FTSE 100 detail their equity story

Typical time spent on page



From segmental tailwinds to supply chain improvements - Philips tell a compelling story.



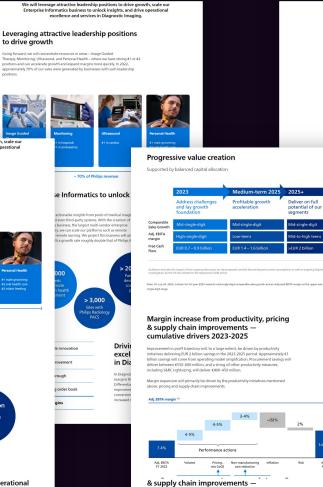
Conversion of strong order book

Higher margins

excellence and services in Diagnostic In

Leveraging attractive leadership positions

to drive growth



cumulative drivers 2023-2025

above, pricing and supply chain improvements.

Improvement in proft trajectory will, to a large extent, be driven by productivity initiatives delivering EUR 2 billion savings in the 2023-2025 period. Approximately €1

billion savings will come from operating model simplification. Procurement savings will

deliver between 6550.600 million, and a string of other productivity measures

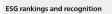
Margin expansion will primarily be driven by the productivity initiatives mentioned



It is our purpose to improve people's health and well-being through meaningful innovation. As a purpose-driven company, we are conscious of our responsibility towards society and of the need to continue to embed sustainability ever deeper in the way we do business. We are partnering with stakeholders to drive environmental, social and governance priorities and make a global impact.

Making the world healthier and more sustainable

- underserved communities, rising to 2.5 billion and 400 million respectively by 2030
- since 2020 and are partnering with customers and uppliers on reducing emissions across the full value chain in line with the 1.5 °C target
- . We are a leader in sustainable innovation (Helium-free for-life MR etc.)
- in 2021 to 25% of sales by 2025





Continued top ranking

Sustainability leadership Carbon leadership

We take a fully integrated ESG approach to doing business responsibly and sustainably









Campaign for refurbished products Securing a Greener Grid: Philip

wind energy initiative

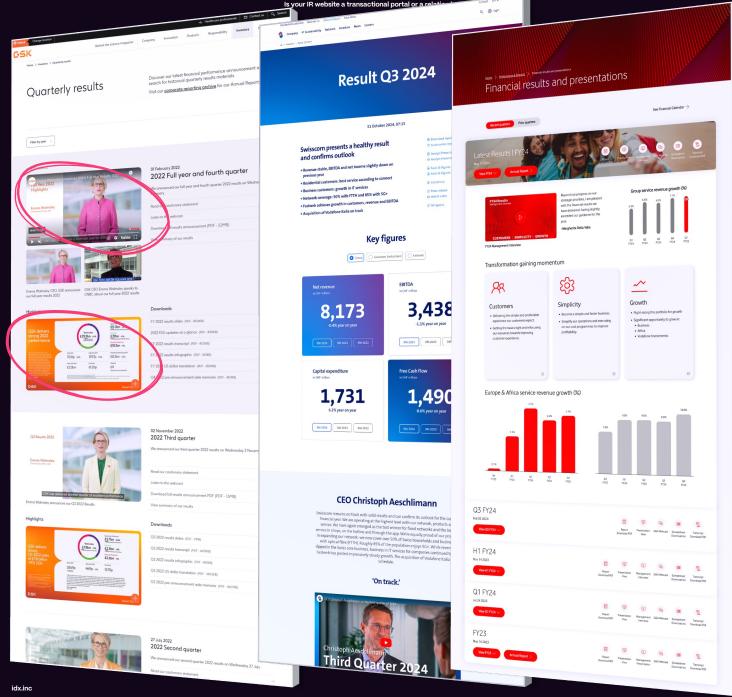
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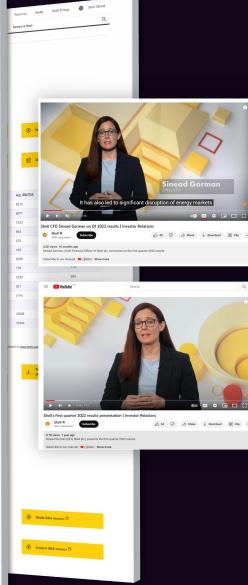
conversion of our strong order book, as well as

increased services pull-through.



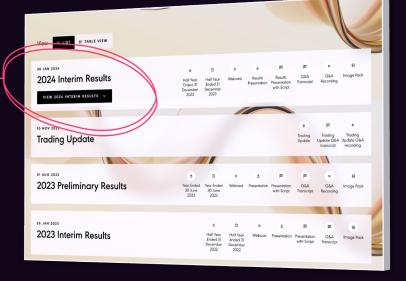
Are your results performance performing?





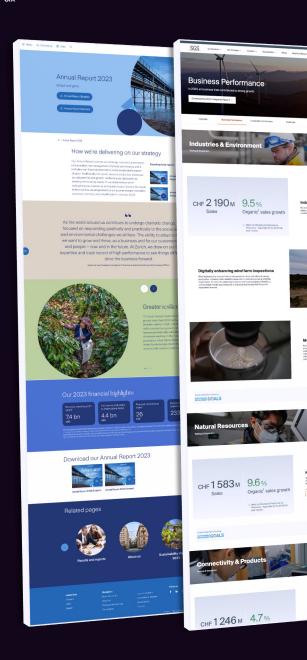


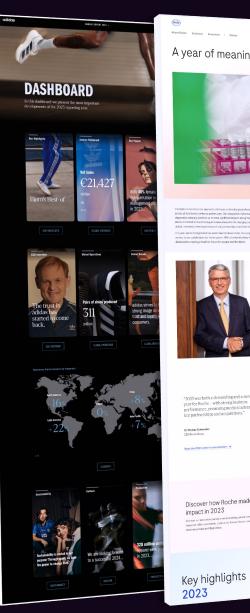


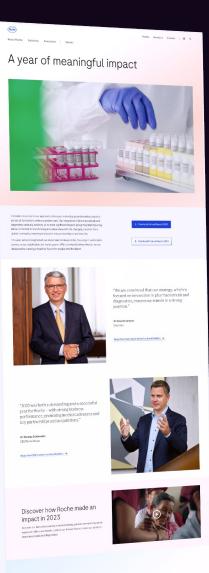


Diageo have combined a simple results list with detailed results summaries

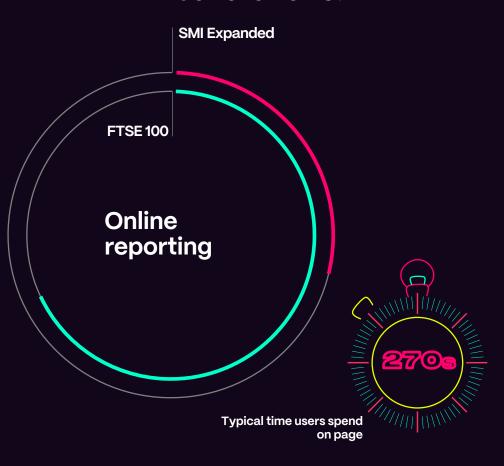
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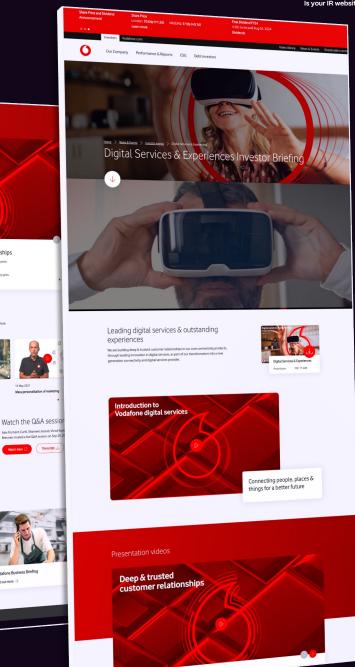


We love a good PDF but is it really the only way to report your annual achievements?



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Is your IR website a transactional portal or a relation building platform?

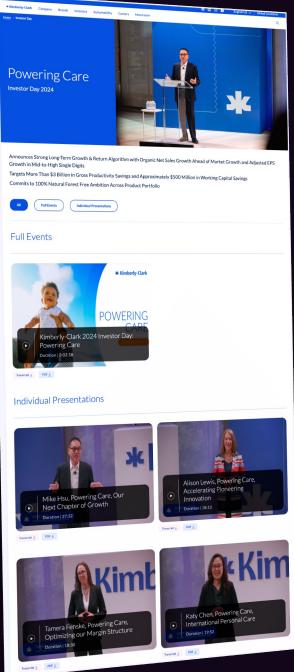


Deep & trusted

Case study videos

customer relationships

Deep & trusted customer relationships



Are your Capital Market Days and investor events making an online impact?

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FINANCIAL RESULTS

Are your Capital Market Days and investor events making an online impact?



Creating a high-performing, competitive, resilient and growing Rolls-Royce

We are building on our strong foundations and advantaged businesses to create a Rolls-Royce that can unlock its full potential

We are setting out the strategic choices that we have made and providing details of the strategic initiatives that will deliver the step change in financial performance we are tergeting. Join us to find out how we are going to do it and what a stronger Rolls-Royce will mean for all our stakeholders.

WATCH THE FULL EVENT



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*Rolls-Royce is at a pivotal point in its history. After a strong start to our transformation programme, we are today laving out a clear vision for the journey we need to take and the areas where we must focus. We are creating a high performing, competitive, resilient and growing Rolls-Royce that will have the financial strength to control and shape its own destiny. We are confident in our ability to achieve these ambitions and have a clear and granular plan to deliver on our targets. We have made significant progress, with 2023 profit and cash forecast to be materially ahead

Tufan Erginbilgic CEO

& DONNALDID (PDF)

Highlights from our Capital Markets Day



Our strategic framework

s-Royce, and make us a high performing, competitive have framed the strategy by being clear on:



Portfolio choices & partnerships

Advantaged businesses & strategic initiatives



Efficiency & simplification

Lower carbon & digitally enabled businesses

growth opportunities. We will also focus on digital enablement



Contact our Investor Relations team

Virtual Exhibition

r. Rolls-Royce who will give further details of the strategic initiatives we are undertaking.

Small Modular Reactors



Civil Aerospace □□□

We are a major manufacturer of aero engines for the large commercial aircraft, regional jet and business aviation markets. We power more than 55 types of commercial aircraft and have more than 12,000 engines flying around the world.



Civil Aerospace

As a major manufacturer of aero engines for the large commercial aircraft, regional jets and business aviation markets this business uses its engineering expertise, in-depth knowledge and capabilities to provide through-life service solutions for its customers.



Improving shop visit cost

One of the strategic initiatives we are focused on, to improve profitability and cash in Civil Aerospace, is reducing shop visit costs. Our teams are relentlessly focused on execution and improving our work practices to reduce costs across our global Maintenance Repair and Overhaul (MRO) network. And, we are doing this at an unprecedented pace.

Extending time on wing

We are working to keep our engines 'on wing' for longer, while maintaining excellent safety, performance and operational availability.





Reducing product cost

The primary focus of our strategic initiative to reduce product cost is to increase the margins and improve the profitability of our both our widebody and business aviation engine programmes. We are aiming for product cost improvements from better buying as well as engineering solutions.

Grow Business Aviation

Rolls-Royce is focusing on areas where we are advantaged and can create winning positions. We are well positioned to do so in the Business Aviation market, with our installed based and the market-leading, efficient and high-performing



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- → Strategy & business model
- → Business areas & markets
- → Innovation



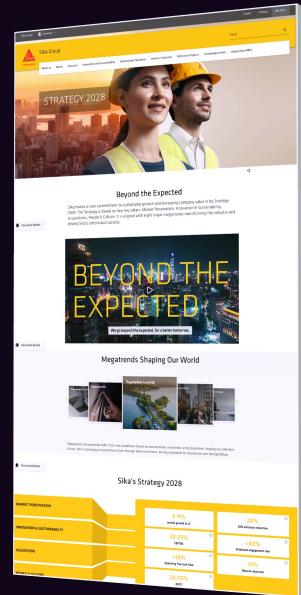
Navigating strategy and value creation



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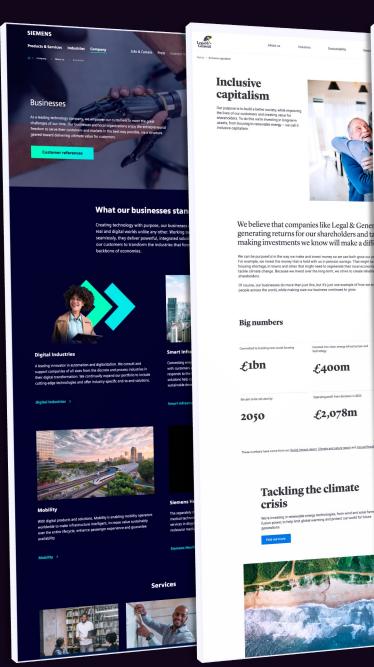
of FTSE100 companies have dedicated strategy pages

Strategy is a Capital Markets top 5 'big picture' content destination



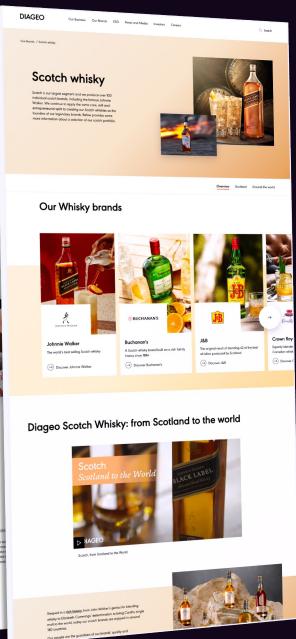






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Why not start at the beginning and tell us what you do, and why you do it.

Every company has a different story – markets, ranges, business units, outcomes – what's yours?



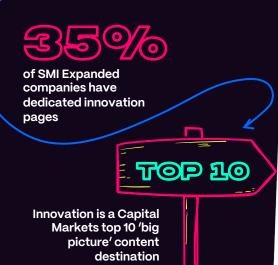
of SMI expanded describe 'what they do', but will investors appreciate it?



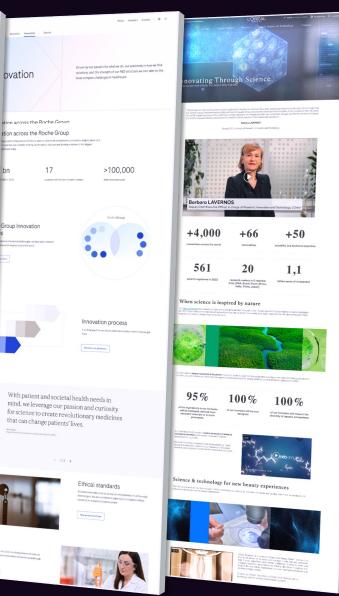
Brands & business units are a Capital Markets top 5 'big picture' content destination

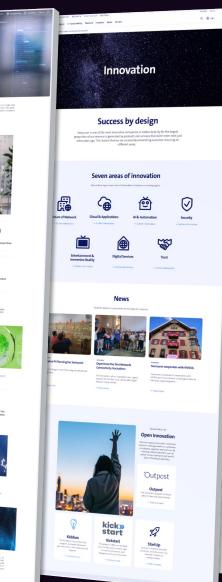


If 96% of executives believe innovation is a primary growth driver*, why are so many companies innovation 'shy'.











* NTT DATA's "Innovation Index 2023: How North American Organizations are Achieving Growth, Value, and High Performance,"

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Do you Al? From home page to hub page, others Al.

As companies look to be seen in the AI arena and explain the impact on their business, and their impact on others, we're starting to see Al content across corporate websites.

From guides and insights to strategy and product integration explainers, the race is on to promote the AI advantage and demonstrate ethical AI usage.

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Al will mean ...

...less searching

...more answers



decrease in search volumes by

as users switch to answer engines

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less google, bing and duckduckgo searches every day

ready?

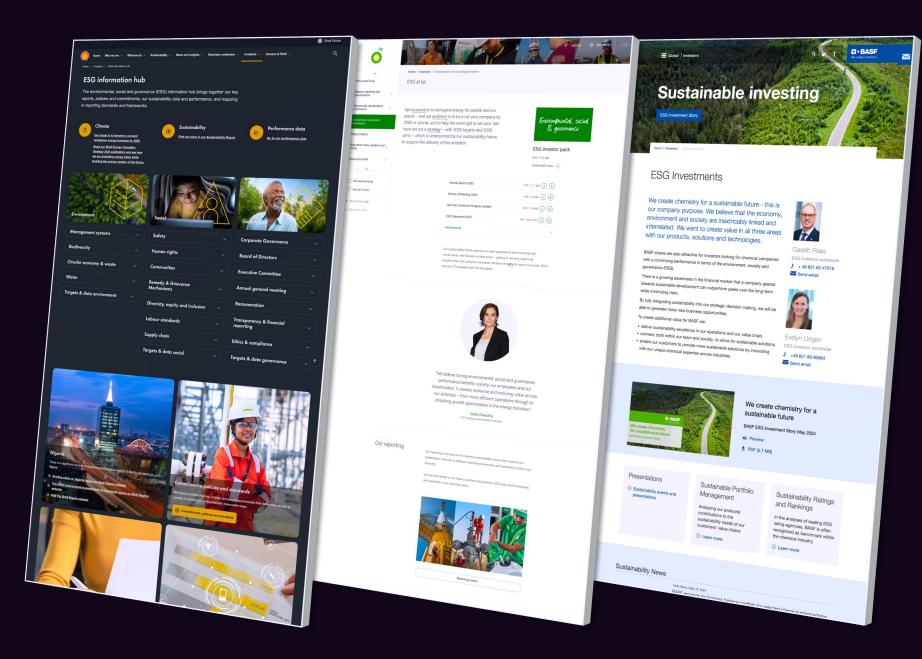
LMO

Large Language Model Optimization

- --> Provide answers
- ---> Pre-chunk content
- → Double down on technical SEO
- → Use public schemas



ESG for investors from sign-posting to story-telling.



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learnings

- Investor sentiment drives investment decisions.
 Your IR and Corporate website should play a role in driving it.
- Your digital communications play a pivotal role in onboarding new investors.
- → A frustrating online experience is a failed online experience.
- ---> There is a huge difference between the best online communicators and those that don't.
- To bridge the gap requires ambition and collaboration as much as resource and technology.



