

CRM system for Investor Relations

Storebrand – an Integrated Financial Services Group



Life and pensions

- 40k corporate customers
- 1.9m individual customers
- NOK 390bn of reserves of which approx. 1/3 Unit Linked



Asset management

- NOK 570bn in AuM of which 23% external assets
- 100% of investments assessed by sustainability criteria



Insurance

- Health, P&C and group life insurance
- NOK 4.5bn in portfolio premiums



Retail bank

- Direct retail bank
- NOK 33bn of net lending



Behov

- Gjennomlysning av aksjonærlisten
- CRM system for å holde oversikt over møter med buy side og sell side
- Mulighet for å ta møtenotater
- Mulighet til styrerapportering

Prosess

- Uformelle møter og telefonsamtaler med mulige tilbydere
- Utforming av RFP sammen med intern innkjøpsavdeling
 - Sikrer profesjonelt forhandlingspartner mot eksterne
 - Bærekraftskriterier, i tillegg til funksjonell og teknisk beskrivelse av oppdraget

Functional description of the assignment

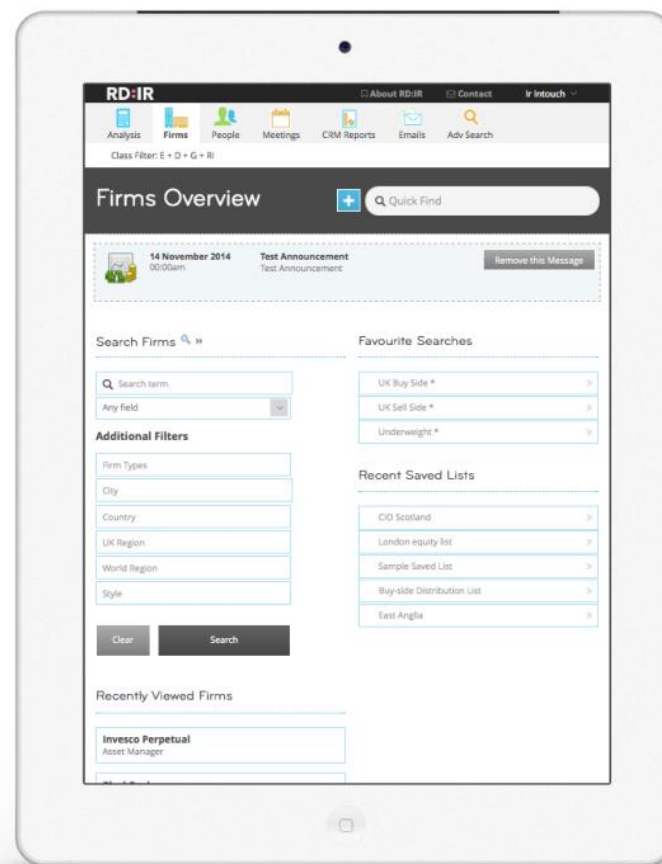
- *In order to efficiently manage the relationships with investor and analyst, Storebrand Investor Relations is in need of a platform able to obtain shareholder/Ownership analysis as well as contact and meeting management (CRM). In addition Storebrand is also interested in possibilities to fulfill requirements linked to email distribution, Investor targeting and analyst consensus, but this is not a requirement, nor a basis for elimination. Main focus will be on user interface and data quality in addition to price.*
- Sendt ut RFP til IPREO, RD:IR, Nasdaq, Orient Capital
- Alle tilbydere leverte grundige besvarelser
 - Forskjeller i pris og prisstruktur

Valgt løsning: RD:IR IR INTOUCH

Our dedicated proprietary investor relations online platform, *IR InTouch*, combines rigorous shareholder analysis with powerful investor contact relationship management (“CRM”) that helps companies manage all stakeholders in one seamless package.

IR InTouch offers:

- Shareholder ownership data
- Debt ownership data
- Peer analysis
- Investor screening / targeting
- Meeting note-keeping
- Investor contact data across all stakeholders (equity / debt / ESG)
- Investor profiling
- Email distribution



Drill down funksjonalitet i aksjonærbasen

RD:IR Enter Report View About RD:IR Contact Ir Intouch

Analysis Firms People Meetings CRM Reports Emails Adv Search **IR:InTouch**

Investor Reports | Group Reports | Bespoke Reports

Overview Fund Manager Reports Style Geographic Peer Registered Holder

Now & Past Fund Manager Report N % V Delamere plc (Ord)

Share register as at: 30 September 2014 | ISC: 61,819,040 | All Registered Shareholders Current Filters: Value | Event Count: 3 | All Investors | Equity Rating:

Fund Manager / Owner	Style	Cumulative Total %	Current Rank	Previous Rank	Shares	Absolute Change	Value at 30/09/2014	Value at 31/08/2014	Value at 31/07/20
Aberdeen Asset Management	Value & Growth	11.57	1	2	7,153,681	973,315	23,821,758	19,529,957	16,811,8
Aviva Investors	GARP	20.95	2	1	5,797,022	-619,856	19,304,083	20,277,334	14,837,8
Directors	Directors	29.02	3	3	4,990,872	0	16,619,604	15,771,156	15,222,1
AXA Framlington Investment Managers	Value & Growth	34.88	4	6	3,622,972	16,000	12,064,497	11,398,032	10,940,4
BlackRock	Hybrid	40.56	5	4	3,508,632	-498,780	11,683,745	12,663,422	20,965,3
Standard Life Investments	Value & Growth	45.89	6	7	3,294,576	-93,362	10,970,938	10,705,884	13,932,5
Legal & General Investment Management	Hybrid	50.37	7	8	2,770,425	-24,988	9,225,515	8,833,505	8,292,5
M&G Investment Management	Value & Growth	54.41	8	10	2,497,707	204,198	8,317,364	7,247,488	6,995,2
Schroder Investment Management	Value & Growth	58.40	9	14	2,466,531	1,038,608	8,213,548	4,512,237	2,266,4
Newton Investment Management	Value & Growth	62.31	10	9	2,418,014	97,975	8,051,987	7,331,323	7,076,1
Threadneedle Investments	Growth	65.42	11	11	1,920,100	-270,000	6,393,933	6,920,716	6,733,4
Invesco Perpetual	Value & Growth	68.24	12	12	1,742,162	-138,096	5,801,399	5,941,615	5,734,7
Hermes Pensions Management	Hybrid	70.98	13	13	1,695,501	89,065	5,646,018	5,076,338	4,899,6
Aberforth Partners	Value	73.13	14		1,329,793	1,329,793	4,428,211		
Insight Investment	Yield	75.23	15	5	1,295,672	-2,367,847	4,314,588	11,576,720	11,579,8
Henderson Global Investors	Value & Growth	77.14	16	16	1,185,906	34,348	3,949,067	3,638,923	3,664,7
SSGA	Index	78.89	17	33	1,076,557	760,647	3,584,935	998,276	926,4

Click on icon for Fund Manager clarification and details

Rapporter tilgjengelig i excel og pdf til ulike stakeholders

Range of reports available to view when you click on the 'Fund Manager Reports' tab which provide insights into investor ownership

The screenshot displays the 'RD:IR' web application interface, specifically the 'Fund Manager Reports' section. The top navigation bar includes 'RD:IR', 'Enter Report View', 'About RD:IR', 'Contact', and 'Ir Intouch'. Below this, a secondary navigation bar lists 'Analysis', 'Firms', 'People', 'Meetings', 'CRM Reports', 'Emails', and 'Adv Search'. The main content area is titled 'Fund Manager Reports' and features a dropdown menu for 'Style' and filters for 'Geographic', 'Peer', and 'Registered Holder'. The reports are organized into a grid of cards, each with a title, a brief description, and a 'View' button. The cards include: 'Now & Past Fund Manager' (latest share holder analysis), 'Comparison Fund Manager' (compare investor holdings), 'Fund Manager Summary' (compare holdings by date and city), 'Stock Lending Analysis' (levels of stocklending), 'New Investors' (new investors since previous register), 'Buyers & Sellers' (changes in investor holdings), 'Absentees' (fund managers with no holding), 'Market Weighting' (compare Fund Manager holding to market), and 'Ultimate Holding Company' (parent company of the investor). The 'View' buttons for 'Comparison Fund Manager', 'Fund Manager Summary', 'Stock Lending Analysis', 'Absentees', and 'Market Weighting' include additional options like 'View Aggregated', 'View Underweight & Absentees', 'View Extract', 'View Complete', 'Overweights', and 'Underweights'.

IR CONTACT MANAGEMENT (via IR INTOUCH)

- Institutional profiling
- Populated with custom researched data
- Ability to plan & record meetings
- Ability to report on IR meetings
- Create reports of key contacts at your investors
- Targeted email distribution lists
- HTML email services
- Includes ability to manage Equity, Debt, Corporate Governance & SRI contacts / meetings
- Comprehensive search facilities including shareholdings
- IR Advisor – An interactive forum for users to share tips on the practicalities of roadshows

IR ACTIVITY REPORT

Date	Title	Type	Location	Institution Name	Current Holding (million shares) & percentage holding at 30/09/2014	External Attendee	Exter City
25/11/2014 09:00	New York Roadshow - Vanguard	One to one	New York	Vanguard Group	0.02m (0.03%)	Christine Franquin	Valley
25/11/2014 10:00	New York Roadshow - Artisan Partners	One to one	New York	Artisan Partners		David Samra	New
25/11/2014 11:00	New York Roadshow - Capital Research	One to one	New York	Capital Research & Management	0.01m (0.02%)	Claudia Huntington	Los A
25/11/2014 12:00	New York Roadshow - Fidelity	One to one	New York	Fidelity Management & Research		Kimberley Monasterio	Bostc
25/11/2014 13:00	New York Roadshow - Lunch Meeting	Lunch	New York	JPMorgan Asset Management		Jeffrey Geller	New
25/11/2014 13:00	New York Roadshow - Lunch Meeting	Lunch	New York	MFS Investment Management		Jeffrey Constantino	Bostc
25/11/2014 13:00	New York Roadshow - Lunch Meeting	Lunch	New York	Oppenheimer Funds		Randall Dishmon	New
03/11/2014 09:00	Chairman's Roadshow	One to one	London	BlackRock	3.51m (5.68%)	Amra Balic	Lond
NOTES: The CG team asked the Chairman questions about the Rem Policy and the credentials of the Rem Committee. Questions handled well by Chairman. Indicated support for Rem Policy.							
22/09/2014 09:30	One to one meeting	One to one	Henley	Invesco Perpetual	1.74m (2.82%)	Mark Barnett	Henk
05/09/2014 09:00	London Roadshow	One to one	London	BlackRock	3.51m (5.68%)	Neil Haddow	Edink
NOTES: Met with the analyst to run through our most recent numbers. Asked some interesting questions around M&A.							
20/08/2014 10:00	London Roadshow	FM one to one	London	AKO Capital		John Sonnerhed	Lond
20/08/2014 09:00	London roadshow	One to one		Marathon Asset Management		Nicholas Longhurst	Lond

- The IR Activity Report is a summary of all the meetings you have had within a given date range
- The report includes meetings added to the system with sell-side, media contacts and consultants
- Meeting notes and current shareholdings are included