

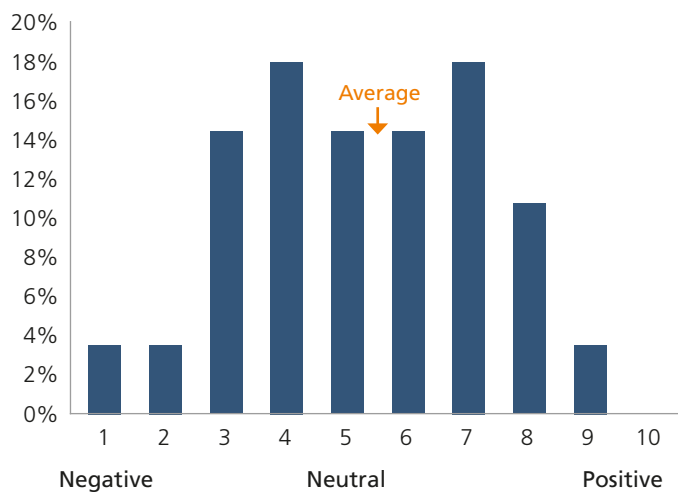
July 2020

Middle East IR *Pulse*

Welcome to the inaugural Middle East IR Pulse, a monthly report and webinar on what matters most to IR professionals and their organizations across the Middle East and North Africa.

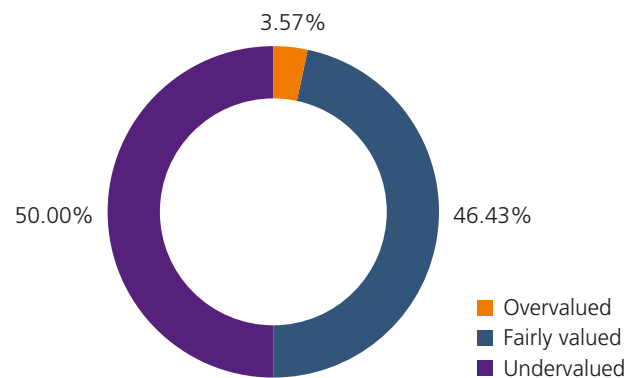
Through the insights and market intelligence of our panel of senior IR experts, we aim to deliver a quick and useful snapshot of the current state of IR in our region and unlock trends and intelligence that help drive better planning and decision making for our regional IR community.

1) Overall investor sentiment towards my market today is...



46% of IR experts surveyed believe investors currently feel positive about their market, to varying degrees.

2) I believe that my company is currently...



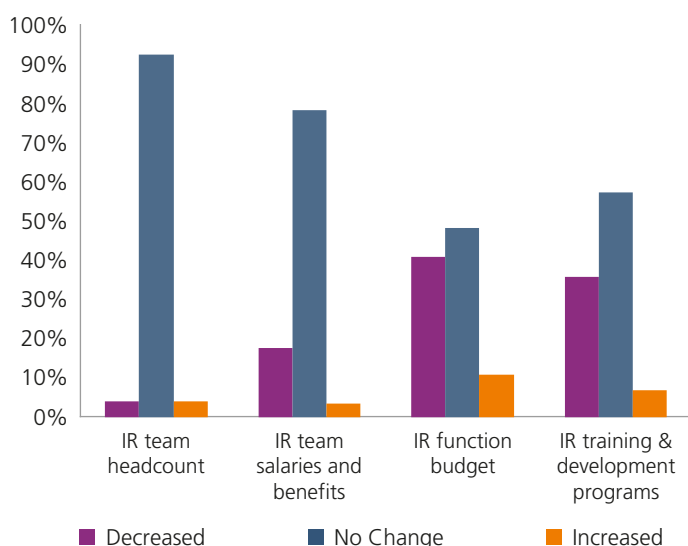
50% of IR experts surveyed believe their company is currently 'Undervalued', while only one person responded 'Overvalued'.

“ This is a global pandemic, so it is not a company or country/ market specific issue that you would need to address to investors. It is perfectly OK to say, 'We don't know what will happen...but we are preparing for multiple scenarios.' Communicating transparently in a crisis is the best strategy. ”

Sofia El Boury, Head of Investor Relations, First Abu Dhabi Bank

My Team and Colleagues

3) Since the beginning of this crisis, our...



Over **40%** of companies surveyed have cut IR budgets since the beginning of the crisis, but **92%** show no decrease in headcounts.

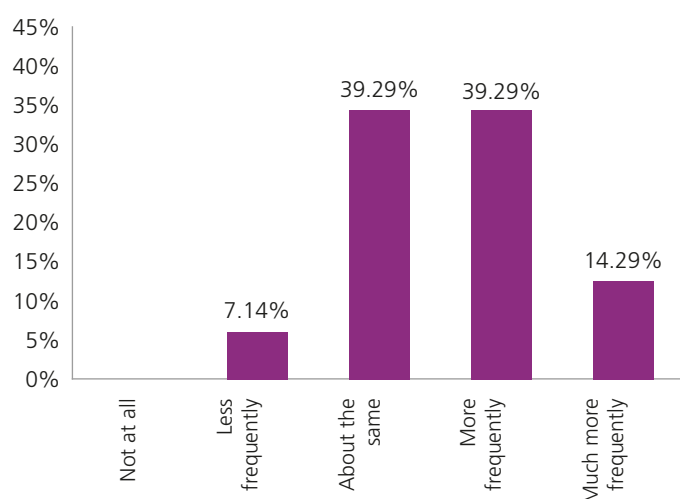
4) Within the next 3 months, my company is planning to launch new employee initiatives focused on...



82% of companies surveyed plan to launch new employee health & wellness initiatives within the next 3 months.

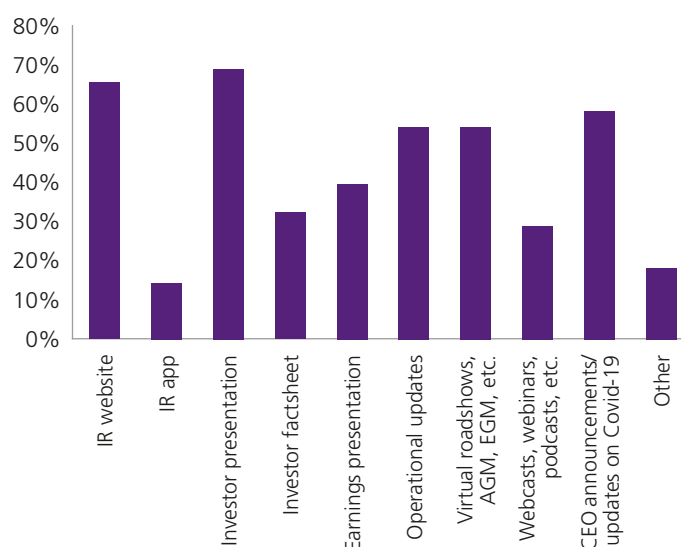
The Way We Work

5) Compared to the beginning of this crisis, we are communicating with our shareholders and other key stakeholders...



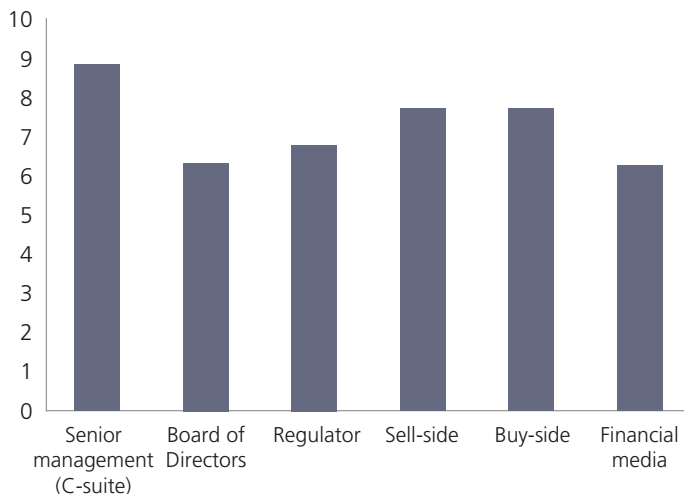
Just over half (**54%**) of companies surveyed are now communicating with their shareholders and other key stakeholders more or much more frequently than before the crisis began.

6) Since the beginning of this crisis, we have introduced and/or improved the following tools/channels for engaging with our stakeholders:



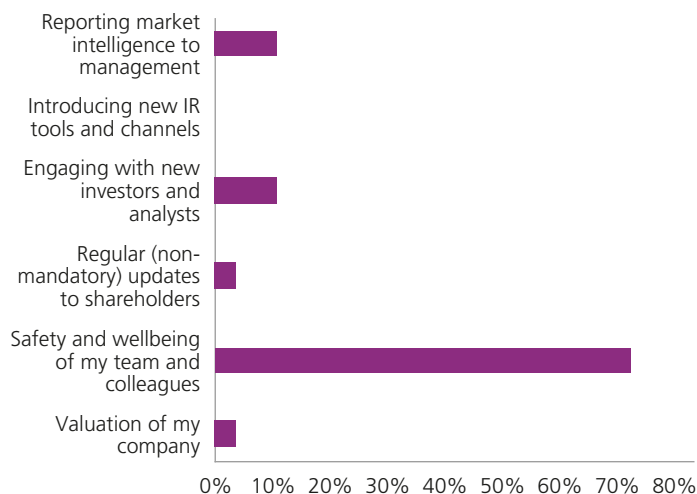
Around **2/3** of companies surveyed have improved their IR website and investor presentation since the beginning of the crisis, while **57%** have introduced CEO announcements/updates regarding Covid-19.

7) Our current level of Investor Relations engagement with...



IR experts surveyed reported a high level of current engagement with their C-suite, buy-side and sell-side analysts, while a significant number reported low to moderate engagement with their Board, regulator and financial media.

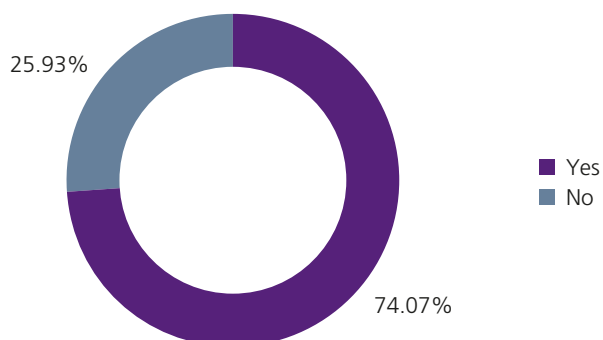
8) My primary professional focus right now is...



71% of IR experts surveyed responded that the 'safety and wellbeing of my team and colleagues' was their #1 focus right now.

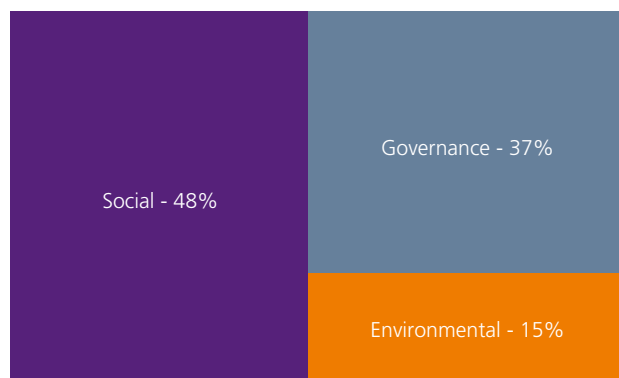
ESG in Focus

9) ESG has taken on increased importance for my company and shareholders since the beginning of this crisis.



Almost **3/4 (74%)** of IR experts surveyed believe that ESG has become more important for their company and shareholders since the beginning of the Covid-19 crisis.

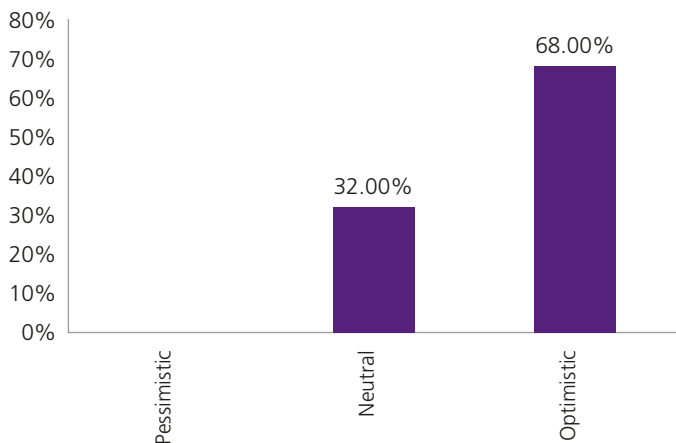
10) Since the beginning of this crisis, the following ESG pillar has been the most important to our stakeholders...



Almost half (**48%**) of IR experts surveyed said 'Social' was the most important ESG pillar for their stakeholders since the beginning of the crisis, followed by 'Governance' and finally 'Environmental'.

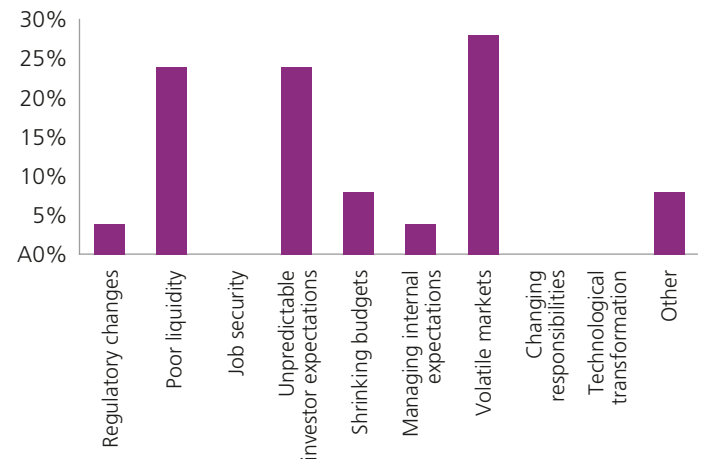
Looking Forward

11) I feel _____
about my company's prospects over the
coming 3 months.



Over **2/3 (68%)** of IR experts surveyed are optimistic about their company's prospects over the coming 3 months.

12) My biggest professional concern over
the coming 3 months is...



28% of IR experts surveyed listed 'volatile markets' as their biggest professional concern over the coming 3 months, while 'unpredictable investor expectations' and 'poor liquidity' were each selected by **24%** of those surveyed.

About the Middle East IR Pulse

A huge thanks to the 28 senior IR leaders who took the time to contribute their insights and expertise to this inaugural Middle East IR Pulse. Together, they represent companies headquartered in eight countries across the Middle East and North Africa, with a combined market capitalization of over USD 200 billion. We greatly appreciate their continued support for the Pulse.

Get in touch

We'd love to hear from you, so please don't hesitate to get in touch:

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