



# PRACTICAL GUIDE FOR INVESTORS

## Participating in Virtual Corporate Access Meetings and Events

OpenExchange’s community-based video solution enables portfolio managers and analysts to communicate more quickly and effectively with company management teams around the globe. Through a simple-to-use interface, the buy side, sell side and corporate issuers can arrange and conduct one-on-one and group meetings using secure, private, high quality video.

OpenExchange, leveraging its web-based video platform, has partnered with a select group of innovative banks to execute a series of virtual corporate access meetings and events in the past several months. As you explore new investment opportunities or engage with existing positions, realize that you’re no longer held to time or geography – a virtual event or conference is a proven way to do additional meetings.

### How it works

Set the agenda on your own terms. These meetings can be whatever they need to be: sector focused, regional opportunities, new analyst coverage, etc. Using OpenExchange, set up one-offs or a ½ day virtual conference, without having to travel. You are no longer constrained by the travel schedule of a corporate or an upcoming conference:

- Schedule meetings in consecutive 45-50 minutes slots
- Q&A format; some may start with brief introduction
- Arrange meetings for one or more companies/investors
- Bank arranges logistics for participating organizations
- Analyst plays vital role in introducing participants/topics

### Getting started

Here’s how you can create and execute a virtual event tailored to your specific needs:

- Step 1 – Speak with analyst, institutional salesperson or corporate access, decide the focus of your effort (sector, company-specific, region, etc.)
- Step 2 – Provide your availability
- Step 3 – Schedules are confirmed
- Step 4 – Join meetings from your conference room, desktop or even iPad

### Recent virtual event



To learn more about how you can design and execute virtual events tailored to your needs contact OpenExchange at [sales@openexc.com](mailto:sales@openexc.com) or +1.617.600.6270.