



Shareholder analysis & IR contact management – case study



Client: SABMiller

Project: Share register analysis and contact relationship management

Background

We started working with SABMiller, the FTSE 100 international brewing company, in 2004 when we began analysis of the share register. RD:IR then took on management of their s793 and s808 requirements and, in 2007, integrated this with RD:IR's contact relationship management software.

SABMiller wanted a fully integrated software system for the share register analysis data and contact database, in order to communicate to targeted e-mail distribution lists to the buy- and sell-side financial institutions.

What we did

SABMiller's share register is unusual in that the proportion of UK-based fund managers is relatively low, with a high percentage in South Africa and North and South America. With an active and international investor relations programme, it is essential for the Board and investor relations team to have an accurate picture of the institutions holding the shares and to know which are buying and selling the stock.

In addition to the rigorous shareholder analysis applied to the share register, RD:IR provides monthly management reports giving commentary on the analysis

and graphical information, particularly with regard to geographic information including the US/UK split of investors. On a quarterly basis a Board report is produced giving greater emphasis to the major themes and trends affecting the share register; for example if there has been any notable shift in the style of institutions investing in the stock.

The integration of this information with the contact relationship management database was tailored to form a platform from which the Investor Relations team could manage their investor relations programme and effectively target existing and potential shareholders.

After importing SABMiller's existing contact and meeting data, the *IR InTouch* team conducted an initial research project contacting existing and potential investors, to ensure the information on the database was accurate and relevant.

Contacts were added to SABMiller's e-mail distribution lists when consent was given by the fund manager, buy-side or sell-side analyst ensuring that all communication sent by the company is targeted effectively to those happy to receive, and interested in, the information being sent.

SABMiller's investor relations team uses the email distribution lists to send financial updates and invitations to seminars and webcasts.

The *IR InTouch* software allows meetings and contact with investors to be recorded. The investor relations team at SABMiller add their meetings to the database so that they can audit and track contact with the investment community.



The integration of the shareholder analysis and contact management information meant we could work with the team at SABMiller to create a system to categorise target investors.

SABMiller chose to assign a platinum, gold, or silver rating to their key institutions and contacts. Reports of any of these categories can be downloaded from the system tracking the institution against historic holdings and weightings and when they were last seen, adding another layer of intelligence to the targeting process.

In 2009 the *IR InTouch+* team ran a global research campaign on behalf of SABMiller to recommend absentee and underweight investors to achieve precise investor targeting.

Outcome

SABMiller's shareholder information is not only linked to its contact database, but tailored to the specific needs of the company to facilitate the ability to use their data effectively, tracking trends and maximising their targeting capabilities.

The relevant contacts researched and visible to the investor relations team exceeds 3,390 including 1,770 in the UK and 780 in the US.

"RD:IR's share register analysis service is always accurate and the contact relationship management system has helped us communicate with our current and potential investors. Also, RD:IR's team ran a very useful targeting exercise recently which has been the basis for our investor targeting refresh."

Gary Leibowitz
Senior Vice President,
Investor Relations