



Certificate in IR syllabus

Course syllabus for the CIR qualification

1. Introduction to Investor Relations

- 1.1 Overview
- 1.2 Key Responsibilities and Internal Stakeholders
- 1.3 External Audiences for IR
- 1.4 External IR Advisers
- 1.5 Best Practice

2. Financial Markets

- 2.1 Global financial markets
- 2.2 How Capital Markets work
- 2.3 Primary and Secondary Markets
- 2.4 Equity Market Investors
- 2.5 Debt Investors
- 2.6 The Growing Importance of ESG Investing
- 2.7 Other Market Participants

3. Corporate Entities and Governance

- 3.1 Legal Definition of a Company
 - 3.2 Forming a Company
 - 3.3 Share Capital
 - 3.4 Company Meetings
 - 3.5 Directors & Company Secretary
 - 3.6 Auditors
 - 3.7 Corporate Governance Codes
 - 3.8 Investor Industry Bodies and Regulatory Reviews
- Appendix : UK Corporate Governance Code

4. Market Conduct

- 4.1 Overview of Regulatory Landscape
- 4.2 UK Market Regulation
- 4.3 Market Misconduct
- 4.4 Regulatory Announcements
- 4.5 Publication of Announcements
- 4.6 Sponsors, Prospectus and Listing Rules



- 4.7 Classification of Transactions
- 4.8 Takeover Panel
- 4.9 The AIM rules

5. Reporting

- 5.1 Overview: Reporting
- 5.2 Periodic Reports – What They Contain
- 5.3 Annual Report
- 5.4 ESG and Other Non-Financial Information
- Appendix I : Leading Global ESG Frameworks
- Appendix II : ESG Materiality and Data Gathering
- Appendix III : Other Information on Regulatory Disclosures

6. Accounting, Valuation and Investment Principles

- 6.1 Accounts
- 6.2 Key Financial Ratios
- 6.3 Financial Modelling and Consensus
- 6.4 Investment Appraisal and Valuation
- 6.5 Valuing a Company
- 6.6 Relative Valuation Methodologies
- 6.7 Absolute Valuation Methodologies
- 6.8 Portfolio theory
- GLOSSARY OF ACCOUNTING TERMS
- GLOSSARY OF CORPORATE FINANCE TERMS

7. Effective IR in Practice

- 7.1 Managing the IR Programme and Annual Cycle
- 7.2 Shareholder Profiling and Targeting
- 7.3 IR Engagement - Principles in Practice
- 7.4 Investor Communications: Tools and Techniques
- 7.5 Conclusion

8. Current IR Issues

- 8.1 Industry news