

IR IMPACT FORUM – AI AND TECHNOLOGY EUROPE

IRO USE CASES - AI DISCOVERY, IMPLEMENTATION AND USAGE

Thursday, March 13, 2025, London

AGENDA

This event is in person only. All times are in Greenwich Mean Time (GMT)

8.15 am **Registration, refreshments and networking**

8.55 am **Welcome to the forum**

Steve Wade, head of content, IR Impact

9.00 am **AI and Technology – A year on**

The implementation of AI has grown exponentially over the last year and only shows signs of a continued and rapid growth. As the hype from its potential spreads and organizations begin exploring use cases, we take a deep dive into the evolution of this phenomenon.

- Discover how the automation of routine tasks, such as financial reporting and compliance, has become more sophisticated
- Consider the crucial role AI is now playing in managing and reporting sustainability metrics, ensuring compliance with new regulations like the EU's CSRD
- Evaluate the growing emphasis on the ethical use of AI, focussing on the frameworks being developed to ensure transparency, accountability and fairness in its application
- Learn how AI tools are being used to deepen engagement with shareholders by providing more personalized and timely communication
- Review how AI-driven predictive analytics are helping IR professionals anticipate market trends and investor behaviour, providing deeper insights into investor sentiment and market conditions.

Moderator: Steve Wade, head of content, IR Impact

Liz Attah, product manager - research applications, Bloomberg

Nick Stone, senior vice president, head of investor relations, Fresenius

Isabel Vilela, head of investor relations and corporate communications, GoviEx Uranium

Irina Zhurba, director of investor relations and sustainability, Mister Spex

9.30 am **Workshop – AI-powered research tactics, competitive intelligence and analysis**

In this session you will use AI and innovative technology to –

- Summarize an analyst note for management
- Write a weekly email for management
- Prepare for a conference Q&A session
- Analyze a slide of data to generate speaking notes.

Bryan Kloster, manager investor relations, AutoNation

10.05 am **Navigating the different stages of your AI adoption journey; assessment, implementation and usage**

The transformative capabilities of AI and innovative technologies are becoming more real each day. Early understanding and adoption of these technologies is key for IROs to stay current and to forge efficient future

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strategies. This panel will focus on how to ensure all the key issues are considered at each stage of your AI and tech adoption journey.

- Actionable insights into where to start your due diligence, assess where you can competently leverage AI and prioritize where to use it
- Develop an implementation strategy considering key success factors such as clear goals, effective communication and proper resource allocation
- Assess how to overcome challenges such as resistance to change, lack of expertise and inadequate training
- Learn how to foresee and address risks and regulatory concerns by efficiently aligning with your legal, compliance and security teams
- Consider the best timelines for continual training, upskilling and gathering feedback for ongoing growth
- Discuss the best prompts to use to get a relevant and reliable answer.

Moderator: Laurie Havelock, editor, IR Impact

Claudia Thome, senior vice president investor relations, CompuGroup Medical

Müge Yücel, director of investor relations & sustainability, Galata Wind

10.35 am **Networking break**

11.05 am **Using AI to efficiently and effectively gather market intelligence**

With the need to search hundreds of thousands of company and industry documents within diminishing time frames IROs are under intense pressure to efficiently extract insight from their competitors, industry and the broader market.

This panel will focus on the solutions that are available to allow IROs to conduct competitive analysis using data and analytics, so they can accurately benchmark their company against its peers and make smarter decisions.

- Overview of how AI is transforming the process of gathering market intelligence for IROs
- Introduction to AI powered data analytics tools that help in gathering and analysing market information
- Utilizing tech to gauge market sentiment, investor perceptions, and forecasting market trends and investor behaviour
- Discuss the role AI has in providing real-time updates and alerts on market movements and news.

Steve Wade, head of content, IR Impact

Irina Logutenkova, head of investor relations, Getech

Daniel Sanchez-Grant, senior vice president, international and UK country director, AlphaSense

11.40 am **Workshop - Pillars where AlphaSense can supercharge your IR program today**

Information is evolving fast, and genAI is changing the game. In this interactive session, the AlphaSense team will break down three powerful ways you can use genAI today to enhance investor communications, gain faster peer insights and control of the narrative.

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AlphaSense is a leading Market Intelligence platform that empowers Investor Relations professionals with Generative AI-driven insights across a comprehensive and proprietary view of transcripts, analyst chatter, equity research, financial data, filings, and news - all in one place.

If you're ready to elevate your IR strategy with AI-driven efficiency, this session is for you. Join us to explore how genAI can:

- Power stronger investor and analyst relationships
- Strengthen market monitoring workflows and enhance strategic communications
- Generate added business value and get IROs a "seat at the table"

Felix Barnard-Weston, enterprise account executive, AlphaSense
Alexandria Hall, vice president, global strategic partnerships, AlphaSense

12.15 pm **Leveraging AI and Platform to elevate IR: Demo**

Join Tanya Thomas, EVP EMEA at Q4, as she explores how artificial intelligence is reshaping IR to drive exceptional outcomes. The session will kick off with an overview of the Q4 Platform, highlighting how IROs benefit from consolidating their tech stack to achieve increased data accuracy and deeper insights.

- Discover how AI enables smarter decision-making, improves efficiency, and uncovers opportunities through advanced data analysis and trend identification
- Get an exclusive first look at Q4's beta AI dashboard on the Q4 Platform, designed to handle the heavy lifting, providing powerful data analysis and delivering actionable insights so you can focus on achieving high-impact IR strategies.

Tanya Thomas, executive vice president, EMEA, Q4

12.50 pm **Lunch**

1.50 pm **Using AI in a secure and accurate way**

Integrating AI into IR can offer significant benefits, but it also presents several challenges, particularly around security and accuracy. In this panel we will look at how we can carefully balance leveraging AI's capabilities while ensuring robust data governance, regulatory compliance and maintaining human oversight.

- Understand how low-quality or biased data can lead to inaccurate insights and decisions, and review the frameworks available to overcome these challenges
- Remain compliant in a complex regulatory environment and learn how the AI act, market abuse and data protection regulations will shape your approach to responsible AI usage
- Assess what measures you can implement to ensure data privacy and protection against cyber threats
- Evaluate the need for human oversight in validating AI-generated insights.

Moderator: Laurie Havelock, editor, IR Impact
Fredrik Erlandsson, head of corporate communications and investor relations, NIBE
Yvonne Harley, director of investor relations and sustainability, NCC Group
Richard Manning, head of investor relations, International Workplace Group

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2.20 pm **Workshop – Leveraging AI and technology to customize earnings call communications for investor insights**

In this hands-on session, you will use AI-powered sentiment and tone analysis tools to analyze earnings presentations scripts and experience how to adapt your language, presentation and feedback based on how investors evaluate your use of language when announcing financial results.

- Understand how AI quantitatively measures language and how to optimize language for these scores
- Identify areas of disconnect between human comprehension and NLP scoring of language
- Test the impact of word and phrase choice on the scoring of an earnings call.

Chris Blake, executive director of product innovation within issuer solutions, S&P Global Market Intelligence

3.00 pm **Reading the room: What do investors need from IROs?**

Investors are increasingly using AI and technology to assist in their analysis of companies. To keep up with the adoption of technology by the buy-side, IROs need to leverage a new wave of AI and technology tools to ensure they remain in sync. This session explores how investors currently use AI, their information needs on companies and ways IR teams can leverage technology to help give investors what they need.

- Learn how the buy-side uses AI and innovative technology to help make investment decisions
- Consider the data investors use to identify a portfolio that fits their specific needs, including their risk tolerance and time horizon
- Gain practical advice on the information investors want from IROs, in what form and through which channels
- Discuss how to use AI to understand investor concerns and tailor your communications more effectively
- Hear best practices for ensuring investors can access IR information in a self-serve format more easily
- Understand how to efficiently integrate AI into your IR website

Steve Wade, head of content, IR Impact

David Grunfeld, founder and CEO, aiiro AI

Ross Hawley, head of investor relations, ZIGUP

Stefanie Mollin, co-portfolio manager – global equities, GIB Asset Management

3.30 pm **Networking break**

4.00 pm **Workshop – Using everyday tools to speed up your response to short-term events**

One thing is certain: occasionally, IR professionals need to deal with unexpected announcements, events, or news stories. During these times, management and investors look to the IR team to communicate the impact on the business—and the clock is ticking.

An investor relations officer who is *proactive about being reactive* and responds clearly and decisively will give the markets confidence, be seen as an extension of the management team and can even help minimize volatility as a result.

In this workshop, we will demonstrate how to use easily accessible tools to quickly assess the impact of a black swan event on your company, anticipate analyst questions, and prepare a rapid response.

Following the demonstration, participants will be given a scenario and asked to apply the techniques to:

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- Understand the impact of an event on your business
- Generate questions the market will want answered
- Prepare for discussions with legal teams
- Draft a response for the market.

Yvonne Harley, director of investor relations and sustainability, NCC Group

4.30 pm **Fireside chat: what next for AI in 2025: challenges and opportunities**

AI and innovative technology are no longer just futuristic concepts. These advancements will help IR professionals stay ahead of the curve, making their work more efficient and impactful. Additionally, as AI helps technology developers build out their capabilities, the rate of development will increase rapidly, so it has never been more important to evaluate your needs and solutions. For this reason, IROs need to fully understand its future capabilities and wholeheartedly embrace them. Here we explore what's next for AI, why it matters and how it will continue to impact the role of an IRO.

- Debate the effect geopolitics will have on regulations and data privacy
- Discuss how security can keep pace with the rapid progress of AI development
- Examine the need for upskilling workforces, focussing on identifying new skills and implementing the required training — for example, prompt engineering, AI ethics, and AI literacy
- Discuss how IR teams can maximize the benefits of their efficiency savings.

Müge Yücel, director of investor relations & sustainability, Galata Wind

4.55 pm **Closing remarks and drinks reception**

5.50 pm **End of drinks reception**