

IR IMPACT FORUM – CANADA

HOW TO THRIVE IN A RAPIDLY CHANGING ENVIRONMENT

Thursday, April 3, 2025, Toronto

AGENDA

This event is in person only. All times are in EST

8.00 am **Registration, refreshments and networking**

8.50 am **Welcome remarks**

Jeff Robinson, sales director, Lumi Global
Steve Wade, head of content, IR Impact

9.00 am **The impact of macroeconomic and geopolitical changes on investor communications**

As geopolitics becomes more unsettled — with regulatory changes, trade pressures and currency fluctuations — the first half of 2025 is primed to be an extremely challenging time for IROs.

This panel will assess the effect these changes have on the role of an IRO and provide a structured way for them to anticipate, prepare for and navigate the multifaceted interaction of social, political and economic factors, and position themselves by creating and maintaining a resilient investor engagement strategy.

- Consider how the Canadian market has changed over the last year and the effects it has had on IR
- Learn how the uncertainty surrounding US tariffs and shifting political priorities could influence cross-border trade and sector performance, and how to change your narrative to compensate
- Discuss how geopolitical events affect investment opportunities and how investors alter their views to make informed decisions and manage risks effectively during these times of flux
- Understand the problems adhering to the various sustainability regulations can cause when creating an engaging story that appeals to new investors, and how to overcome them – with a focus on CSRD.

Moderator: Steve Wade, head of content, IR Impact

Amin Mousavian, vice president of investor relations, treasury and interim chief risk officer, TMX Group

Thang To, executive vice president, head of investor day practice, Corbin Advisors

9.35 am **From experimentation to integration: leveraging AI for best practice investor days**

In the ever-changing economic landscape, the role of a successful investor day should be prioritized as an essential part of any IR strategy. They are a powerful tool to showcase your company's competitive edge, help foster trust and transparency or continually drive investor interest in your firm.

This panel will explore AI-driven strategies and techniques for organizing investor days that engage with your audience, equipping IROs with the tools needed to deliver a captivating investor day that instructs, inspires and shapes trust with investors.

- Consider the increased levels of AI adoption and its role in enhancing efficiency and engagement during investor days
- Discuss how using generative AI for agenda creation, material preparation and stakeholder targeting during the pre-event planning stage can aid in a successful day
- Hear the essential factors to consider when creating an all-engaging hybrid investor day
- Discover how leveraging AI to summarize dense reports, identify trends and tailor communications can ensure content optimisation
- Evaluate the best methods of balancing AI tools with human oversight to maintain a personal connection with investors

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- Case studies: hear how companies are streamlining preparation for investor days with AI.

Moderator: Laurie Havelock, editor, IR Impact

Jeff Robinson, sales director, Lumi Global

Ivan Zarate, manager, corporate reporting and investor relations, Air Canada

10.10 am 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

10.40 am Networking break

11.20 am Updating processes and procedures when activists come knocking

Following recent changes in the political environment, the fall in value of the Canadian Dollar and an increase in laws and regulations that encourage shareholders to exercise their rights, there is a strong need for companies to have well-rehearsed, stringent and comprehensive processes in place when activists come knocking. This panel aids IROs create a playbook to help navigate, prevent and manage activist attacks given changing tactics and approaches.

- Discuss the steps you can take to try to avert any activist campaigns: what are the initial signs?
- Understand the process of working with external counsel and advisors effectively when an activist is at the door
- Attune your company's engagement practices to ensure they continue to be effective: asses the change in narrative and which channels you use to report
- Consider how you will need to adapt by understanding your shareholder base better
- Hear how to efficiently manage and brief the board during an activist campaign
- Discover if activism makes the capital markets more efficient over the longer term.

Moderator: Laurie Havelock, editor, IR Impact

Jennifer McCaughey, director of investor relations, Calian Group

Valerie Roberts, vice president capital markets, Parkland Corporation

11.50 am The evolution of the IRO: techniques to elevate and reinvent the role

Against the backdrop of an increasingly complex business, finance and regulatory setting, the function of an IRO is constantly changing and evolving.

This panel of experts will discuss the pressures put on IROs to continually elevate and reinvent themselves. Hear about the strategies, support and opportunities available to help investor relations professionals evolve and achieve their long-term career goals.

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- Consider how the role of an IRO has changed over the last five years
- Learn best practices for creating a platform to build, strengthen and broaden your influence within an organization
- Assess the role of key performance metrics in evaluating progress against your companies' goals to demonstrate the value of IR to internal stakeholders
- Discuss the advantages of connecting with your peers in professional associations and at networking events to gain knowledge, education and guidance
- Evaluate how to add value in a functional role that is augmented or automated with gen AI.

Moderator: Steve Wade, head of content, IR Impact

Adam Borgatti, senior vice president, corporate development and investor relations, Aecon

Nathalie Megann, president and chief executive officer, Canadian Investor Relations Institute (CIRI)

Shereen Zahawi, head of investor relations, MDA Space

12.20 pm

Ready or not, AI is here to stay

Integrating AI into an investor relations strategy can offer significant benefits, but it also presents several challenges.

In this panel we will look at what tools are easily available and how we can carefully balance leveraging their capabilities while ensuring robust data governance, regulatory compliance and maintaining human oversight.

- Learn about the AI tools and innovative technology currently available, alongside case studies of how IR teams are incorporating these tools into their activities
- Establish a process to assess which tools are most relevant to your needs
- Understand how to effectively implement AI and remain compliant in an increasingly complex regulatory environment
- Discuss the methods and frameworks available to overcome issues relating to security, data privacy and accuracy, as well as implementing responsible AI usage
- Hear the most used prompts that get the best outcomes for IR teams
- Debate the benefits of service providers merging their technologies: is there now a one size fits all?
- Evaluate the need for human oversight in validating AI-generated insights.

Moderator: Laurie Havelock, editor, IR Impact

Christopher Deans, assistant vice president investor relations, IMG Financial

Greg Secord, vice president of investor relations, OpenText

12.50 pm

Lunch

12.50 pm

Optional roundtable discussion for dual listed companies led by The Nuvo Group

As we move through 2025, SEC filing services will be crucial for companies to adapt to regulatory changes. Staying on top of compliance trends and utilizing expert filing assistance will help public companies navigate the shifting SEC landscape, ensuring filings are accurate, timely, and compliant to maintain investor trust and avoid regulatory scrutiny.

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Canadian dual-listed public companies face additional challenges, needing to comply with both SEC (USA) and CSA (Canada) regulations. This dual compliance can be complex and time-consuming, leading to increased administrative burdens and costs.

This optional roundtable discussion will highlight these challenges and explore how to establish robust systems and processes for compliance and efficient filing operations across both jurisdictions.

- Have open and frank discussions with your peers around the challenges dual listed companies face
- Share and learn from others on how to fulfil your filing obligations
- Learn how to streamline your filing processes
- Examine advanced filing technologies that can help guarantee precise and rapid changes are made in real-time to ensure deadlines are met

Nicolas Arruda, Partner, Dorsey and Whitney LLP

Tony Barletta, managing partner, The Nuvo Group

Arti Gandhi, director of iXBRL, The Nuvo Group

Scott Lam, senior vice president US and Canada, The Nuvo Group

1.50 pm

The ultimate guide to a successful earnings call that boosts your equity story

Employing effective strategies for successful earnings calls is crucial for any company aiming to enhance its communication with the investment community.

This panel of experts will focus on the strategies, techniques and methods IROs must use to ensure an effective, comprehensive and successful earnings call.

- Discuss effective strategies to educate, engage and construct lasting trust with investors during your earnings call
- Debate how to craft impactful, consistent and transparent messages to manage investor expectations, address concerns and build brand credibility
- Hear how to master the Q&A section by anticipating questions and preparing responses that align with your overall narrative
- Learn about the supporting materials that can add value to your earnings calls
- Speaker selection: Learn how to evaluate and coach your full bench of senior management so they resonate and address investor queries
- Consider how AI and technology can aid in all aspects of the call.

Moderator: Steve Wade, head of content, IR Impact

Dave Bezanson, vice president investor relations and pensions, Emera

Jean-Marie Clouet, vice president investor relations, Agnico Eagle Mines

Erin Greenfield, president and portfolio manager, Greenfield Investment Management

Chris Makuch, senior director, Notified

2.30 pm

ESG is dead? – Long live ESG!

As the corporate landscape in Canada continues to evolve, significant changes in how companies approach ESG initiatives are expected in 2025. As a result, the role of the Canadian IRO is becoming more challenging, requiring a deeper understanding of sustainability issues, regulations and the effective communication methods needed to manage risks and maintain investor confidence.

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This panel will focus on the future of ESG and the strategies required to effectively communicate your company's alignment with new standards and regulations.

- Debate the shortcomings of the current ESG approach: whether it has failed to deliver necessary change and whether the market needs to be redesigned to eliminate the conflict between profitability and sustainability
- Consider the value of Bill C-59 and the increased pressure IROs will face to ensure accurate and transparent sustainability reporting
- Discuss the critical role IROs will now have in communicating their company's alignment with Canada's new climate taxonomy and disclosure rules
- Evaluate the newly introduced legislation aimed at creating a new supply chain due diligence regime and what this means for IROs.

Moderator: Steve Wade, head of content, IR Impact

Prabh Banga, vice president sustainability, Aecon Group,

Jack Mintz, president's fellow of the school of public policy, University of Calgary

3.00 pm

Critical ways to optimize your targeting strategy

Investor relations professionals are always on the lookout for novel methods to connect with the most suitable investors. In this session we explore strategies to raise your company's profile, generate both issuer and shareholder value and plug investor gaps, all while re-engaging current investors and consolidating your relationship with them.

- Evaluate the need to understand your investor base, its investment criteria and decision-making process
- Learn how to ensure passive investors have the correct and most up to date information about your company
- Discuss the use of technology, data analytics and AI to identify and prioritize potential investors
- Assess the benefits of both long term and short-term stakeholders
- Debate the best practices to engage with retail and institutional investors, and how to tailor your messaging to each
- Consider how to attract international investors and overcome different market regulations.

Moderator: Steve Wade, head of content, IR Impact

Karen Keyes, head of investor relations, Canadian Tire Corporation

Jess Nieukerk, vice president investor relations, Stantec

Brandon Throop, director, investor relations, New Gold

3.30 pm

Closing remarks and end of event