

# IR IMPACT FORUM

AI & Technology, Targeting and Small Cap IR

Wednesday, November 12, 2025, New York

## AGENDA

This event is in person only. All times are in Eastern Standard Time (EST)

Room	AI AND TECHNOLOGY STREAM Chrysler Forum	TARGETING STREAM Park Hub
8.15 am	Registration, refreshments and networking	
8.55 am	Welcome to the forum	<b>Setting your targeting strategy: adapting to change and uncertainty</b>  In an uncertain and risk-off market, perfecting your targeting strategy has never been more critical... nor has it been more complex. As you look to strengthen your shareholder base amid volatility, we start the conference by exploring ways to recalibrate your approach for today's realities, sharing practical insights on how IR professionals can develop a strategy that effectively identifies, prioritizes and engages the right investors for their business.  From deciding who to partner with, understanding your investor base, to choosing the most effective roadshow destinations, this discussion will cover the strategic targeting frameworks and that can bring success. <ul style="list-style-type: none"><li>• Explore how to identify high-potential investors based on fit, behavior and relevance in the current economy</li><li>• Understand changing attitudes around international investment and targeting in different geographies resulting from shifts in the global economy and geopolitics</li><li>• Evaluate whether to pursue broker supported targeting or a direct strategy as the buy-side and sell side approaches evolve</li><li>• Learn how to build a dynamic targeting strategy that balances reach, efficiency and return in a changing and uncertain environment</li></ul>
9.00 am	<b>Navigating the AI frontier: A comprehensive update on industry developments</b>  As AI continues to evolve at an unrelenting pace, IROs must constantly educate themselves on how the industry is changing and understand the effects that failing to stay ahead of the curve will have on their role. Remaining informed is no longer optional—it's a strategic necessity. In this panel, leading IROs will explore the most impactful AI advancements, the platforms and tools gaining greatest traction and the emerging trends that are redefining the IROs function. <ul style="list-style-type: none"><li>• Examine the AI and technological needs of today's IROs and assess whether recent shifts in the vendor landscape are effectively meeting those demands</li><li>• Discover the latest advancements in AI and technology and explore how they can enhance targeting strategies, refine earnings call preparations and strengthen competitive positioning.</li><li>• Discuss if there is a "one stop shop" and examine how different platforms and tools are being successfully used in unison for a variety of IR functions</li></ul>	

	<ul style="list-style-type: none"> <li>Consider the crucial role AI is now playing in managing and reporting sustainability metrics, ensuring compliance with new regulations like the evolving SEC disclosure requirements</li> <li>Gather strategic insights into what the next steps in the AI and Tech evolution will be</li> </ul>	
9.30 am	<p><b>Workshop - Strategic reasoning with AI. Leveraging Next-Gen LLMs in Investor Relations</b></p> <p>As large language models evolve beyond content generation into advanced reasoning and decision support, Investor Relations professionals have a powerful new toolkit at their fingertips.</p> <p>This workshop explores how to harness the capabilities of reasoning LLMs, like GPT-4o, Gemini 1.5, and Claude 3, for strategic analysis, investor engagement and communication planning. Learn how to go beyond prompts and use AI as a thinking partner in your IR strategy</p>	<p><b>Roundtables: Establishing your targeting strategy</b></p> <p>Building on the themes from the opening keynote, this interactive roundtable session gives you the chance to step into the conversation. Designed for open dialogue and peer-to-peer learning, this session invites attendees to share what is working, what is changing and how they are navigating investor targeting in today’s evolving landscape.</p> <p>If you’re rethinking your approach to roadshows, weighing the benefits of sell-side support or experimenting with new data tools, this is your opportunity to compare notes with fellow IR professionals and take away fresh ideas.</p>
10.05 am	<p><b>An effective roadmap for AI adoption and use: How to efficiently collaborate with your legal and IT departments</b></p> <p>As AI technologies rapidly evolve, organizations face increasing pressure to integrate intelligent systems responsibly and efficiently. However, successful AI adoption is not just a technical challenge, it requires seamless collaboration across departments, particularly Legal and IT.</p> <p>This panel will explore the strategies and tactics IROs can use to ensure successful AI adoption, implementation and usage, that balances innovation with compliance, security, and operational integrity</p> <ul style="list-style-type: none"> <li>Understand the specific challenges your legal and IT teams face when evaluating the implementation of AI and emerging technologies</li> <li>Learn how to foresee and address IT risks and regulatory concerns</li> <li>Best practices for engaging legal teams early to navigate regulatory and ethical considerations.</li> <li>Strategies for partnering with IT to ensure scalable, secure and unbiased AI systems.</li> <li>Identify the internal infrastructure and workforce required for the effective adoption</li> <li>Assess the importance of cross-departmental AI committees to ensure alignment of AI adoption strategies with compliance and technical feasibility</li> </ul>	<ul style="list-style-type: none"> <li>Stress test your targeting strategy and get honest feedback from fellow senior IROs</li> <li>Hear how other IR professionals are adjusting their targeting strategies in response to market shifts</li> <li>Share your own experiences and challenges in a collaborative, off-the-record setting</li> <li>Get answers to your most pressing questions about prioritization, engagement and ROI</li> <li>Leave with practical insights, creative solutions and renewed confidence in your approach</li> </ul>

	<ul style="list-style-type: none"> <li>Insights into overcoming a lack of resources in money, people and infrastructure to enhance company wide acceptance</li> </ul>	
10.35 am	Networking break in the exhibition area	

Room	AI AND TECHNOLOGY STREAM Chrysler Forum	TARGETING STREAM Park Hub
11.05 am	<p><b>Measuring the unmeasurable and immeasurable. Demonstrating the value of AI investment</b></p> <p>Many IROs struggle to justify AI investments, expecting to demonstrate clear, measurable benefits, when AI remains a complex and often misunderstood technology among key stakeholders. This session brings clarity by providing a roadmap for measuring the ROI of AI. Enabling IROs to quantify the success of AI, track its tangible impact and measure the results effectively proving that the effort, money and time invested in AI are worthwhile.</p> <ul style="list-style-type: none"> <li>Discuss what ROI actually looks like and consider the challenges around defining it.</li> <li>Understand how to showcase successful AI and technology use cases and their impact on business metrics</li> <li>Debate the relevance of “hard” and “soft” benefits and examine which are most important to you, cost and time saving v employee satisfaction and retention</li> <li>Learn how your peers are monetizing the use of AI</li> </ul>	<p><b>Practical targeting tips: real actions to implement across the whole targeting process</b></p> <p>This session focuses on the real, tactical steps you can take to make your investor targeting more effective from start to finish. From identifying the right investors to tailoring outreach and measuring success, we will explore practical tips IR teams are using right now to improve outcomes in a challenging market.</p> <p>Designed for those looking to move beyond high-level strategy, this session will provide actionable advice, simple tools and useful examples to help sharpen every stage of the targeting process.</p> <ul style="list-style-type: none"> <li>Effective ways to create a realistic target list using data, investor profiles and conversion likelihood to increase effectiveness</li> <li>Learn ways to tailor outreach based on your company’s current outlook and what different investors want to hear</li> <li>Understand how to set clear targeting goals, track performance and use feedback to improve future results</li> </ul>
11.40 am	<p><b>Workshop – The new buy-side persona, AI language processing: Understanding how investors are measuring language and how to optimize your communications.</b></p> <p>Buy-side investors have long utilized technology to measure and analyze the language being used by public companies. In today’s environment, AI is further accelerating this approach for both the complexity of analysis and the proliferation across investment community. In this workshop, understand how many investors are using this technology and how you can adjust your language to account for it. Get hands on experience with tools that can analyze your language, both in secure private settings as well as more complex analysis of public documents.</p>	<p><b>Roundtables: Tactical targeting tips &amp; tricks</b></p> <p>Our second roundtable discussion goes into greater detail on what IR teams are actually doing to improve investor targeting across each stage of the process: From building better target lists to improving outreach and measuring success. This is your chance to share what’s working, hear what others are trying and walk away with ideas you can immediately implement.</p> <ul style="list-style-type: none"> <li>Talk through how others are identifying and prioritizing investors that are likely to engage</li> <li>Share ideas for outreach tactics that are landing with investors in today’s environment</li> </ul>

12.15 pm	<p><b>Case Study. Smart, safe and strategic: Leveraging AI in a secure way.</b></p> <p>This interactive session explores how IR teams can leverage AI capabilities to enhance performance, deepen investor engagement and stay compliant.</p>	<ul style="list-style-type: none"> <li>• Discuss simple ways to measure what's working and how to adapt quickly</li> <li>• Hear how others are demonstrating ROI from investor engagement and securing more IR time from management</li> </ul>
12.50 pm	Networking lunch in the exhibition area	<i>Women in IR networking lunch – <b>SOLD OUT</b></i>
Room	<b>AI AND TECHNOLOGY STREAM</b> Chrysler Forum	<b>SMALL CAP STREAM</b> Park Hub
1.50 pm	<p><b>Turning conversations into action: Conquering the fear of embracing AI and innovative technology</b></p> <p>The integration of AI and innovative technology into IR workflows is inevitable, yet many IROs face resistance due to regulatory concerns, security risks, and operational disruptions.</p> <p>In this session we will explore how IR teams can embrace AI confidently, address fears from internal stakeholders and leverage AI for data-driven investor engagement.</p> <ul style="list-style-type: none"> <li>• Assess how clear communication, continual training and early stakeholder alignment can streamline AI acceptance</li> <li>• Consider what guard rails you can implement to ensure data privacy and protection against cyber threats and data breaches</li> <li>• Explore the ethical frameworks for integrating AI, while prioritising human impact and addressing employee concerns relating to AI-driven job displacement. (you won't lose your job to AI, but you may lose your job to someone who is using AI)</li> </ul>	<p><b>Panel Discussion: Navigating investor relations at small cap companies</b></p> <p>Small cap companies operate with distinct challenges in investor relations, particularly in the current economic environment where institutional investors often favor larger, more liquid companies. With limited analyst coverage, constrained access to corporate access programs, and smaller budgets, IR professionals at small cap companies must take a more targeted and resourceful approach.</p> <p>This panel will bring together IR leaders from small cap companies (under \$2Bn market cap) to discuss how they are approaching visibility, investor outreach, and communications in a competitive landscape. Panelists will share practical methods for increasing investor engagement, leveraging access to management, and delivering effective results with limited resources.</p> <ul style="list-style-type: none"> <li>• Approaches to increase visibility and investor interest with limited sell-side support</li> <li>• Practical considerations for improving investor access and targeting in a constrained market</li> <li>• How to use access to management to support investor and analyst engagement</li> <li>• Tactics to maximize the effectiveness of a limited IR budget</li> </ul>
2.20 pm	<p><b>How will Agentic AI change IR workflows and what are the associated risks and opportunities</b></p> <p>Investor Relations Officers are beginning to explore Agentic AI to enhance efficiency and engagement in financial communications. Unlike traditional AI, Agentic AI can autonomously analyze data, generate insights, and even interact with stakeholders without the need for constant human intervention. This session will explore the evolution of Agentic AI, strategizing ways to enhance its opportunities while addressing the associated risks and challenges.</p>	<p><b>Roundtables: Practical solutions for small cap IR teams</b></p> <p>IR professionals at small cap companies are often required to manage broad responsibilities with fewer resources, less external coverage, and limited institutional visibility. This interactive roundtable discussion offers a space for peer-to-peer exchange of practical approaches to improve investor targeting, visibility, and engagement.</p> <p>Participants will have the opportunity to discuss their current challenges and hear how others in similar roles are addressing them. Topics will include creative approaches to</p>

	<ul style="list-style-type: none"> <li>Gain insights into how your peers are utilizing agentic AI to enhance risk assessment, engage stakeholders, automate reporting and collect market intelligence.</li> <li>Create a strategy for developing and scaling agentic AI ecosystems that are efficient, well-governed and future-proof.</li> <li>Recognize the new risks that agentic AI poses to data security, trust and transparency, and identify the steps necessary to mitigate these risks.</li> <li>Consider the regulatory uncertainties surrounding agentic AI implementation and usage, along with strategies to ensure compliance.</li> <li>Discuss the efficiency gains associated with agentic AI and evaluate methods for quantifying operational cost reductions.</li> </ul>	<p>investor outreach, ways to increase coverage, and efficient use of management time and IR budgets.</p> <ul style="list-style-type: none"> <li>Peer insights on targeting and outreach strategies specific to small cap constraints</li> <li>Discussion on how to build interest among investors despite low liquidity or limited coverage</li> <li>Ideas for leveraging existing resources and management access more effectively</li> </ul>
2.50 pm	<p><b>Workshop. AI Agentics in IR: automating insight gathering, engagement and implementation</b></p> <p>The next frontier in Investor Relations is here! AI agents that can think, act and collaborate.</p> <p>This workshop introduces you to the world of AI Agentics—autonomous, task-driven AI systems that can monitor markets, draft communications, and even simulate investor interactions. Learn how to deploy and manage AI agents to enhance productivity, deepen insights, and personalize investor engagement at scale.</p>	
3.30 pm	Networking break	

Room	AI AND TECHNOLOGY FORUM Chrysler Forum
4.00 pm	<p><b>Workshop - AI-powered targeting: How AI can enhance outreach and engaging with new investors</b></p> <p>In today’s competitive capital markets, finding and engaging the right investors is more critical and complex than ever before. This hands-on workshop will give you tactical insights into how to leverage AI to identify potential investors, personalize outreach and optimize engagement strategies. Learn how to move beyond static targeting lists and embrace dynamic, data-driven investor discovery.</p>
4.30 pm	<b>How are the buy-side harnessing AI to optimize decision making and why does generative engine optimization matter</b>

	<p>As buy-side firms rapidly adopt AI to enhance investment analysis, decision-making, and portfolio management, IR professionals must evolve in parallel. This panel offers a behind-the-scenes look at how institutional investors are using AI—and how IR teams can leverage similar tools to anticipate investor behavior, tailor engagement, and sharpen their strategic communications</p> <ul style="list-style-type: none"> <li>• Discuss how you can adapt your IR strategy and messaging to AI-driven capital markets</li> <li>• Tactical guidance for optimizing web communications for generative AI discovery, a deep dive into the emergence of generative engine optimization</li> <li>• Debate whether AI-driven algorithmic trading is emerging as the driving force behind buy-side strategies and how to overcome the associated challenges</li> <li>• Strategic insights into how AI is being used for predictive analytics, sentiment analysis and alternative data integration</li> <li>• Consider the role of machine learning in portfolio optimization and trade execution</li> <li>• Learn effective strategies to enhance investor access to IR information through streamlined self-service formats</li> <li>• Learn how to integrate AI into your IR website efficiently</li> </ul>
<b>4.55 pm</b>	<b>Closing remarks and drinks reception</b>
<b>5.50 pm</b>	<b>End of drinks reception</b>