

IR Impact Forum & Awards – Greater China

Adapting to change in Greater China:
IR strategies for a sustainable, digital and global era

Thursday, December 4, 2025, Conrad Hong Kong

AGENDA

This event is in person only. All times are in Hong Kong Time (HKT). Timings are subject to change.

8.15 am Registration, breakfast and networking

8.55 am Opening remarks: Welcome to the forum

Laurie Havelock, editor, IR Impact

9.00 am Finding the right fit: How to target effectively in a rapidly changing global market

In today's volatile global capital environment, investor relations officers (IROs) are under pressure to find innovative strategies beyond broad outreach to engage with the right investors. With Asian equities seeing strong growth over the last decade, Hong Kong emerging as a global hub, and US investors continuing to play a pivotal role, IROs must balance geopolitical complexities, cross-border regulations, and shifting investor appetites to succeed in this global market.

This session will explore how IROs can sharpen their targeting strategies by leveraging new tools, platforms, and practices to connect with US and international investors. With OTC Markets at the forefront of cross-border investor access, this discussion will highlight practical frameworks, case studies, and market insights that help issuers enhance visibility, foster investor trust, and mitigate risk in a rapidly evolving environment.

- Leveraging Market Data: How to use market data, trading platforms such as OTC Markets, and regulatory exemptions to identify and prioritize investor groups that align with your target investors.
- Practical Insights for Efficient Targeting: Learn how OTC Markets offers Asian IROs and related professionals' visibility into US institutional and retail investors, minus the costs and added complexities of the US market.
- Embracing Opportunities in a Volatile Market: Understand how IROs can manage geopolitical uncertainty, a volatile market, and regulatory obligations to position an organization in an ideal spot to grow global interest in Asian equities.

Moderator: Laurie Havelock, editor, IR Impact

Jason Paltrowitz, executive vice president, OTC Markets Group

Michael Letros, specialist sales solutions for corporate boards, C-suites & investor relations, Bloomberg

9.30 am Maximizing valuation: Delivering a compelling investment case to the right investors

Creating value in Asia's markets requires a compelling equity story and disciplined investor focus. For CFOs and IR teams, it's not enough to have a strong narrative: delivering the right message to the right investors, using the most effective engagement approaches, is vital.

This panel draws on real examples from across the region, highlighting how companies can sharpen their investment case by acting on investor feedback, focusing on long only investors, and using Capital Markets Days to shape expectations and drive valuation.

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- Feedback to drive results: Discover how independent investor feedback can refine your equity story and why relying solely on brokers is often insufficient.
- Real-world case studies: Hear real-world case studies on leading companies from across the Greater China region and the financial sector.
- Investor targeting strategies: Learn how to focus outreach on investors with a genuine appetite and tailor your message for different markets.
- Capital Markets Days execution: Gather practical tips on planning and running CMDs that are proven to build conviction, reset expectations, and strengthen valuation.
- Enhance your investibility: Take away actionable insights and proven practices to increase your company's appeal to investors.

Moderator: Laurie Havelock, editor, IR Impact

Patrick Bowes, chief of investor relations, Prudential

Yafei Tian, head of investor relations, Asia pacific, HSBC

Kirsten Molyneux, partner, head of capital markets and investor advisory, Asia, FGS Global

10.00 am Artificial intelligence: How IR can keep pace with investors and analysts

The buy-side and sell-side are already leveraging AI to analyze companies, their disclosures and their earnings, and the rate of adoption is rapid. IR teams need to examine the impact of AI on the investor relations function – both in terms of how investors get their information and how they can improve their communications.

This session will demonstrate how to develop an effective AI strategy for investor relations, focusing on both how IR teams can implement AI in their own role and how to adapt to the use of AI by their stakeholders.

- Discuss how investors are using AI, why IR needs to adapt and how to catch up with investors.
- Understand the security or ROI considerations from open-source, enterprise and purpose-built AI tools.
- Learn how to strategize implementation by mapping traditional IR responsibilities to AI capabilities.

Moderator: Laurie Havelock, editor, IR Impact

Akshay Coppa, partner and vice president of products, Euroland IR

Song Lei, executive director and head of product research, New Harvest Wealth Securities Company Limited

10.30 am Networking break & refreshments

11.00 am How technology can transform IR communications

A crucial responsibility for IROs is delivering professional, timely and accurate reports. As regulatory expectations in Hong Kong and mainland China continue to converge with global standards, IR teams face the challenge of balancing compliance with the demand for more accessible, accurate reporting.

This panel discussion will highlight how IR teams can leverage collaboration to streamline the reporting cycle, mitigate operational challenges, and deliver reports that meet international standards effectively while reflecting local market needs. By integrating smarter tools and adopting innovative approaches to working, IROs can transform the reporting process to foster investor trust and ensure consistency across all key communications.

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- Utilizing digital tools for efficient reporting: Practical case studies on how to leverage digital tools to improve the speed and precision of producing crucial reports.
- Balancing local and global regulations: Insights on navigating Greater China's evolving regulatory frameworks while aligning with international investor expectations.
- Streamline collaboration for successful reporting: Explore how cross-departmental and cross-market alignment is critical to producing accurate, consistent, investor-ready reports.
- Crafting reports investors can trust: Discover how clear, accessible and well-structured reporting enhances transparency and builds lasting confidence with stakeholders.

*Moderator: Laurie Havelock, editor, IR Impact
Aileen Zhou, head of sales, CtrlPrint*

11.30 am Roadshows and beyond: Tailored engagement strategies to reduce concentration risk and build your investor base

Traditional roadshows are not the only strategy to reach the wider investor landscape. IROs are looking for new, innovative approaches to connect with the right investors. Increased listings in home markets have resulted in higher competition for capital and the need to access new pools of capital in different geographies.

This session will explore how IROs can balance digital and in-person engagement strategies to broaden their investor reach. Expert IROs will share tangible and innovative ways to improve targeting strategies, leverage digital platforms for IR, improve virtual and in-person roadshow results and increase visibility among new investors.

- Adapt engagement strategies to align with diverse global market expectations from navigating US disclosure standards, EU sustainability regulations or Middle Eastern capital access requirements, while prioritizing compliance with regional data privacy rules
- Discover how international and regional investors are sourcing, consuming and engaging with information and how that impacts outreach strategies

Moderator: Laurie Havelock, editor, IR Impact

11.55 am Closing remarks

Steven Wade, head of content, IR Impact

12.00 pm IR Impact Awards – Greater China & Networking Lunch

2.30 pm End of forum and awards