

IR IMPACT FORUM – AI & TECHNOLOGY

Lead the change: AI strategies for tomorrow's IR

Thursday, March 12, 2026, 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 **Navigating the AI and tech evolution: what IR professionals need to know now and next**

AI is influencing businesses, communications and investor relations... this much you already know! However, you may ask yourself if you're being left behind or want to get ahead of the curve.

That's where our first session comes in: We forensically examine the current state of AI and tech in investor relations and predict future trends and use cases that IR teams should explore to keep ahead of the curve in this rapidly evolving area.

- Examine what today's IROs need to succeed and evaluate whether recent changes among technology providers are truly delivering on those expectations
- Understand what an award-winning IR strategy looks like and benchmark your own usage against your peers
- Gain strategic insights into managing the regulatory complexity surrounding AI and learn how to anticipate disclosure requirements for AI ethics, bias and data governance
- Explore best practices to find, evaluate and implement the most relevant tech for your business needs
- Debate where the market is going and what the future will look like

Moderator: Steve Wade, head of content, IR Impact

Alexandre Bouvier, co-founder and CEO, OPENIR Technologies

Jane Henderson, investor relations manager, BAT

Luke Murphy, head of investor relations and chief of staff, TPXimpact

9.30 am **Workshop – Decoding the new buy-side mindset: how sentiment analysis is evolving with AI**

Investors have long relied on technology to analyze the words and tone used by public companies and this practice is now advancing at speed, with new tools making analysis more sophisticated and widespread across the investment community.

In this workshop, you'll learn how investors are leveraging these capabilities and what that means for your communications strategy. Discover practical ways to refine your messaging and get hands-on experience with tools that assess language in both secure, private environments and through deeper analysis of public disclosures.

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

10.00 am **Building trust and governance within your AI-driven workflows**

AI is becoming an essential tool for IR professionals. It can help with earnings call preparation, investor targeting, ESG reporting and real-time sentiment analysis, but as adoption grows one challenge remains constant: trust. AI

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cannot be a black box within your company, for IROs to use it effectively and responsibly it must be explainable, transparent and well governed.

This panel will show you how to integrate AI into your IR workflows in a way that builds confidence with stakeholders, encourages further AI usage while still meeting regulatory expectations.

- Gain strategic insights into navigating a fragmented AI regulatory landscape and understand where these evolving regulations impact the use-cases within investor relations. Allowing you to maintain up-to-date in-house usage policies and educate stakeholders on security and compliance issues
- Discover how to accurately disclose AI usage in your workflows, both internally and externally
- Best practices for overcoming internal resistance and building trust in AI among management and stakeholders

*Moderator: Laurie Havelock, editor, IR Impact
Ross Hawley, head of investor relations, ZIGUP
Greg Secord, vice president investor relations, OpenText*

10.30 am **Networking break**

11.00 am **Workshop - Using AI tools to enrich your capital markets day preparation**

This hands-on workshop will showcase how to use Claude, ChatGPT and Copilot as practical thought partners when preparing for capital markets day. You will use the same documents and prompts within each platform to see how the results differ in accuracy, structure and usability.

You will leave with a clear sense of which AI tools work best for which tasks, where the risks sit and how to build a repeatable workflow that saves time while improving message control.

- Gain strategic insights into how AI can transform capital markets day preparation
- Learn how to use AI to write in the style of your C-suite
- Debate the strengths, weaknesses and variety of output for different platforms
- Develop a structured AI workflow for capital markets day preparation
- Understand what prompts work best

Richard Manning, head of investor relations, International Workplace Group

11.30 am **Demonstration – prompt engineering: starting, building and achieving desired outcomes**

Successful prompts are the foundations that make AI work for you effectively. This demo will give you a step-by-step guide to generate prompts to help create IR content that matches your company's voice. Hear actionable insights into how to continually nurture them and train models to get clear, useful answers. You'll also learn how to make sure prompt responses are accurate and reliable, so you can trust what you share.

- Understand best practices for preparing, creating and using successful prompts that IR teams can use
- Learn how to craft prompts that have the correct tone, structure and language to mirror your company's strategy
- Discover actionable strategies to avoid hallucinations and biased data

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- Gain practical insights into ensuring your prompts include all relevant data points and context

Demian Flowers, industry specialist, Bloomberg

12.00 pm

Interactive presentation: Agentic AI in IR – what it is and how it will transform the earnings cycle

Agentic AI is reshaping how IR teams prepare for results, engage with investors and manage rising expectations across the market. By shifting from manual data assembly to real time perception generation, agentic AI can transform the earnings lifecycle from a series of high-pressure tasks into a steady source of investor insight. This session will explain what agentic AI is, why it matters and how it can create a more strategic, efficient and insight-driven IR strategy for your earnings lifecycle. It will provide a blueprint for turning the chaos of results season into a structured, automated command center for your corporate narrative.

- Define what agentic AI is and assess the opportunities and risks for IR teams
- Explore how agentic workflows prepare you for each step of the earnings cycle by synthesizing market signals, themes and narrative risks in real time
- Discuss how agentic AI can strengthen engagement analytics, measure outreach effectiveness and fine-tune communication strategies
- Examine how agentic systems can unearth problems early by monitoring research, peer calls and investor behaviour before concerns reach the board
- Consider governance, regulatory questions and practical steps for scaling agentic AI responsibly inside the IR function

Darrell Heaps, chairman and chief strategy officer, Q4

12.30 pm

Lunch

1.30 pm

Showcasing the impact: how to build a clear AI for IR strategy that demonstrates measurable ROI

Artificial Intelligence is everywhere, but turning hype into implementation and measurable ROI needs a solid plan in place.

This panel will dive into what it really takes to craft a successful AI strategy that aligns with your business goals, receives stakeholder buy-in and delivers results that you can prove through clear metrics.

- Discuss what makes an AI strategy successful, who needs to be involved and how to keep it current
- Examine the benefits of moving from experimentation toward integrating AI in broader IR workflows instead of leaving them as isolated tasks
- Debate the best fit AI format – build in-house or buy off-the-shelf
- Explore what ROI really means and discuss why both tangible and intangible benefits matter
- Learn which KPIs IR teams are using to measure AI's impact and show clear proof of improved efficiency, accuracy, quality and productivity
- Hear what strategies your peers are using and how they are effectively monetizing AI

Moderator: Laurie Havelock, editor, IR Impact

Daniel Györy, senior director investor relations, Infineon

Müge Yücel, director of investor relations and sustainability, Galata Wind Enerji

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2.00 pm **Demonstration – Using Avatars to elevate your financial results communication**

Companies are starting to rethink how they present full year results to investors, analysts and the wider investment community. One emerging approach is the use of AI generated video to make results more accessible and engaging. This interactive demonstration will showcase how AI can be used to produce an additional video that explains full year results in greater depth and how it can help IR teams simplify complex messages, reach wider audiences and deliver content in formats that are better for investors.

- Examine why AI generated video is becoming a useful tool for results communication
- Gain insights into best practices for integrating an AI video into your full year results cycle – inception, creation and production
- Explore the processes to ensure C-Suite buy in – time and understanding
- Discover how to overcome compliance issues and learn lessons to ensure transparency and message control

Martijn Massen, head of investor relations and treasury, NSI

2.30 pm **Deciphering how investors and analysts use AI and how to keep ahead of the curve**

AI is shaking up the way investors spot opportunities, dig into companies and decide where to put their money. For IROs, that means a whole new set of challenges. Figuring out how these AI-driven strategies work, making sure your company is attractive to algorithm-driven searches and keeping your story consistent in a world obsessed with data, to name a few.

In this panel, we'll talk about how the buy-side and sell-side are really using AI, what that means for IR teams and share practical tips to help you stay ahead of the curve.

- Understand what specific data the analysts are looking for when deciding where to invest and which AI-powered channels they are using to gather this information
- Learn how to use AI internally to audit your communications, benchmark against peers and understand how investors' algorithms might score your company
- Gain practical strategies for creating stronger investor relationships in an environment that increasingly relies on AI to discover, analyze and summarize information
- Discuss tactics to anticipate investor questions and prepare rapid-response tactics to manage narratives before algorithms amplify misinterpretations
- Learn how to craft AI-friendly messaging without losing authenticity
- Consider the role that Search Engine Optimization (SEO) and Generative Engine Optimization (GEO) play in maximising visibility

Moderator: Steve Wade, head of content, IR Impact

Alex Bibani, senior portfolio manager, Allianz Global Investors

Simon Gittings, director, investor relations and corporate communications, IDX

Matt Johnson, group communications director, Vodafone

3.00 pm **Networking break**

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3.30 pm **Workshop – Boosting IR efficiency with document creation using Google NotebookLM**

This workshop focuses on the free features in Google Notebook LM that can help you improve efficiency and accuracy within your IR workflows.

By the end of this session, you will have real-world experience in:

- Organizing investor decks and reports for quick AI-driven insights
- Creating mind maps to simplify complex financial narratives
- Using multilanguage support for global investor communication
- Collaborating securely with your team in real time
- Summarizing large documents and extracting key points efficiently

Müge Yücel, director of investor relations and sustainability, Galata Wind Enerji

4.00 pm **AI-driven market intelligence and benchmarking for the modern IRO**

IR teams are under pressure to deliver insights fast. Understanding the market and effective benchmarking are essential skills to do so, but the processes are often slow and manual with the required data scattered across countless sources. This panel explores the challenges IR professionals face and how AI can make the process smarter, faster and more effective.

- Learn practical ways to make peer benchmarking consistent and comparable
- Consider how predictive analytics can support the shift from reactive communication to proactive engagement - helping control the narrative, anticipate investor concerns and improve risk management
- Discuss the limitations and opportunities of applying AI to interpret market signals, understand investor expectations and forecast emerging patterns in behavior and performance

Moderator: Laurie Havelock, editor, IR Impact

Emilia Rannaniemi, senior investor relations manager, Finnair

Souheil Salah, investor relations operations director, GSK

4.30 pm **Summary and closing remarks**

4.45 pm **Drinks reception**

5.45 pm **End of drinks reception**