IR IMPACT FORUM – CANADA

Navigating structural uncertainty and shifting markets: the evolving role of IR in Canada

Thursday, April 2, 2026, Lumi Experience, Toronto

AGENDA

All times are in EST. Timings are subject to change.

8.00 am **Registration, refreshments and networking**

8.50 am **Welcome remarks**

Steve Wade, head of content, IR Impact

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

As geopolitics, such as Canada-US relations, and the subsequent economic uncertainty is increasingly shaping investor discussions. We share how best to communicate with investors effectively and manage expectations amid ongoing uncertainty, while maintaining your credibility.

- Examine how investors analyze company narratives during periods of geopolitical volatility and which factors influence their decision-making
- Enhance your equity story by understanding how buy-side and sell-side participants prioritize information when macro uncertainty shapes investment analysis
- Explore how to focus discussions on fundamentals, capital allocation and performance to demonstrate long-term value

Moderator: Steve Wade, head of content, IR Impact

9.30 am **Faster markets, shorter reactions: how tokenization of securities and 24-hour trading will redefine IR**

In 2026, Canada will move from a traditional market window to a more 'always-on' approach. As the market shifts from theoretical to operational, regulated frameworks - Canadian Securities Administrators and Canadian Investment Regulatory Organization are actively developing approaches to digital assets and tokenized instruments. The introduction of tokenized securities and extended trading hours could have a significant impact on the frequency that investors assess and act on information about your stock.

This change could raise expectations for IR teams' responsiveness and preparedness, which is why we explore how extended trading hours and securities tokenization could impact shareholder bases, investor behavior and stakeholder expectations. The discussion will then turn to what changes IR teams should consider regarding disclosures, team structures, response KPIs and other IR workflows.

- Explore how a shift toward 24-hour trading and tokenized securities is changing expectations around disclosure
- Discuss how IR strategies and processes should change in an environment where trading occurs around the clock
- Learn how IR leaders are adapting processes to manage operational pressures and meet changing expectations around information expectations

Moderator: Laurie Havelock, editor, IR Impact

10.00 am **Networking break**

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10.30 am **Understanding the evolving role of IR**

The IR role is increasingly expanding, whether being combined with adjacent functions or growing ownership and responsibilities being taken on by the IR team.

The expanding scope of what IR teams are expected to deliver bodes well for elevating the IR role. IR Impact research indicates that IR teams in North America are growing since 2024; however, operating with reduced budgets and constrained resources continues to affect in-house IR teams. This session explores two sides of the same coin: IR leaders who have successfully improved access to resources and addressed internal constraints, and those navigating an expanded remit with limited support. The discussion will focus on how IROs can prioritize effectively and maintain their impact as expectations of the IR function continue to grow.

- Examine how the IR role and expectations are changing and how to ensure IR teams deliver as the role elevates
- Learn how IR leaders are prioritizing work to build their impact as the remit of IROs continues to expand
- Understand how embracing greater integration and cross-functional relationships can improve consistency of messaging and impact

Moderator: Laurie Havelock, editor, IR Impact
Adam Borgatti, senior vice president, corporate development and investor relations, Aecon Group
Matthew Pallotta, head of investor relations and senior director, finance, Celestica

11.00 am **Communicating the value of IR to the C-suite**

Continuing our theme of elevating the IR function, which plays a pivotal role in providing insight into strategy to supporting capital access, we examine how to showcase the impact IR has on the company. Showcasing the impact and importance for IR is essential in securing C-suite time and obtaining budget.

We explore how IROs are communicating and measuring the value of IR internally, using KPIs to help them align more effectively with the C-suite on responsibilities and value, while demonstrating IR’s importance in an environment shaped by structural uncertainty.

- Understand how IR leaders are aligning with the C-suite on priorities, responsibilities and what success looks like for this function
- Explore practical ways to secure C-suite time for critical discussions by demonstrating IR's contribution to the company
- Learn how IROs are measuring their impact and how to communicate KPIs in the context of an uncertain market

Moderator: Laurie Havelock, editor, IR Impact
Nathalie Megann, president and chief executive officer, Canadian Investor Relations Institute (CIRI)

11.30 am **The rise of passive investors: how your IR strategy needs to adapt**

In an increasingly passive market, where active investors are becoming more concentrated, prudent IR teams should assess their engagement strategies. To help in this endeavor, we explore how engagement works in practice, what passive investors expect from issuers and the vital role active investors play in a more passive investing environment.

This session examines where IR teams can realistically influence outcomes by adapting their engagement approach, helping IR teams prioritize engagement more effectively, understand how stewardship expectations are exercised and reassess where active engagement adds value to IR teams.

- Identify how the shift toward passive ownership is changing investor engagement in Canada
- Explore ways to effectively communicate with passive investors

Moderator: Steve Wade, head of content, IR Impact

12.00 pm **Lunch**

12.00 pm **Lunch roundtable: Tapping into the US market – taking the pain out of dual listings through synchronized reporting**

This roundtable is a must-attend for those interested in exploring a dual listing or who already have one in place*

In an interactive session led by legal, technological and operational experts, we aim to demystify the listing pathways and disclosure obligations for Canadian issuers seeking enhanced liquidity, coverage and visibility by tapping into the US market. Engage with fellow IR peers, both those evaluating listings and those currently listed on a US exchange, on how they are navigating this terrain.

- Explore the different pathways to dual listings, helping you decide what options suit you best
- Gain clarity on the disclosure and compliance obligations of US listings and reduce reporting fatigue by learning about the distinct requirements for Canadian issuers and how to leverage AI for SEC Disclosure technology and established SEC Filing partners to streamline the reporting process
- Understand the impact of recent changes to US rules and filing systems on Canadian dual-listed companies, as well as the efforts being made on behalf of Canadian issuers to reduce the impact
- Share insights on adapting to different expectations from US exchanges and investors regarding communication cadence and governance practices
- Discuss how to synchronize legal, operational, and technological aspects to streamline reporting and maximize the benefits of a dual listing

*This roundtable has limited capacity. Sign up while registering for the conference to secure your place.

Scott Lam, senior vice president, US and Canada, The Nuvo Group
Melissa Fincher, vice president, The Nuvo Group
Payton McCoy, co-founder and CEO, Greenshoe
Nicholas Arruda, partner, Dorsey + Whitney

1.00 pm **Navigating investor priorities in a concentrated, volatile market**

Investor engagement is becoming increasingly selective as ownership becomes progressively concentrated, placing greater pressure on IR teams to focus on engagement where it has the greatest impact. Similarly, ongoing macroeconomic and geopolitical uncertainty, including Canada-US relations, continues to influence how investors evaluate companies, while remaining focused on core fundamentals such as financial performance and capital allocation.

This panel explores how investors balance external structural uncertainty while prioritizing company performance and how IR teams can meet changing expectations.

The discussion will focus on:

- How investors prioritize engagement in a dense and increasingly passive market
- How the current macroeconomic climate, including geopolitical themes, affects investor decision-making
- Explore practical ways to align your IR strategy with evolving investor expectations

Moderator: Steve Wade, head of content, IR Impact
Greg Costa, senior vice president, IR advisory, Corbin Advisors

1.30 pm **Governance and voting dynamics: understanding shareholder influence and decision-making**

Governance outcomes are shaped by a range of voting parties, from stewardship teams at institutional shareholders to proxy advisors to activist campaigns. Scrutiny around proxy advisor influence and operational changes from these parties makes predicting voting outcomes increasingly opaque.

This session examines how governance and voting decisions are formed, where influence sits and how shareholders prioritize governance issues and decide how to vote. We show how IR teams can better support management and the boards on governance-related matters.

- Understand how governance priorities are assessed and weighed in voting decisions amid structural changes affecting proxy season
- Examine where influence sits regarding voting outcomes and the impact IR teams can have supporting the company's corporate governance efforts
- Explore how to apply this understanding to support internal executive leadership teams in preparing for proxy season and achieving positive results at the AGM

Moderator: Steve Wade, head of content, IR Impact

2.00 pm **Networking break**

2.15 pm **How visible is your content? Strengthening your presence on AI tools**

As investors increasingly rely on AI-driven tools to identify and analyze company information, the visibility of IR content is changing. Earnings materials, investor communications and web content are being filtered and prioritized by algorithms, shifting control over what investors see first and how information is framed.

This session examines how AI is affecting the visibility of IR content, which materials are most exposed to AI-driven analysis and how IR teams can improve clarity and consistency across content to ensure key messages are accurately represented. Senior IR leaders will discuss how they are adapting content strategy to maintain visibility and reduce misinterpretation in an AI-influenced market.

- Identify how AI-driven tools are changing how IR content is discovered and consumed

- Understand how clarity and consistency across disclosures, presentations and web content influence how AI analyses company information
- Examine which AI-driven insights are most relevant for your IR strategy without compromising on accuracy and credibility
- Explore practical strategies, including answer engine optimization (AEO) and search engine optimization (SEO), for your IR content to maintain visibility in an AI-influenced domain

Moderator: Steve Wade, head of content, IR Impact

2.45 pm **Lessons from the buy-side: how AI is impacting the investment process**

AI is increasingly embedded in investor and analyst workflows, but how it is being used in practice is not always clear to IR teams. This session provides insight into how investors and analysts are using AI, from influencing screening, shaping investment analysis and ultimately making investment decisions.

The discussion focuses on what IROs need to understand about AI-driven investor behaviors, helping IR teams identify which insights are most relevant and how to reflect these key factors in their own IR strategies.

- Explore how investors and buy-side analysts are using AI in discovering companies and investment analysis
- Learn about the type of data that investors leverage, the tools they use and how it has changed their approach to investing
- Explore how to adapt IR strategies and outreach approaches by understanding how the buy-side uses AI and its impact on IR workflows

Moderator: Steve Wade, head of content, IR Impact

3.15 pm **Closing remarks**

3.30 pm **End of conference**