

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
Jeff Robinson, sales director, Lumi Global

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

As macroeconomic uncertainty is increasingly shaping investor discussions, this session will explore how best to communicate with investors effectively and manage expectations amid ongoing uncertainty, while maintaining your credibility.

- Explore how investors analyze company narratives during periods of volatility
- 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
James Allison, vice president, investor relations and treasury, Pet Valu
Stephen King, vice president, strategy and investor relations, NFI Group

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 fireside chat will focus on how IR teams should consider disclosures, team structures, response KPIs and other IR workflows in a potential 24-hour trading market.

- 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 adapting processes to manage operational pressures and to meet changing expectations around information expectations could improve your existing workflows

Moderator: Laurie Havelock, editor, IR Impact
Amin Mousavian, vice president of investor relations, treasury, and interim chief risk officer, TMX Group

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

David Ocampo, head of investor relations, ATS Corporation

Matthew Pallotta, head of investor relations, 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)

Gord Nelson, chief financial officer, Cineplex Entertainment

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

In an increasingly passive market, where ownership is concentrated among large index managers, IR teams must reassess not only who they engage with — but how and where that engagement takes place.

This session explores how engagement works in practice in a more passive environment, what stewardship expectations look like in reality, and where IR teams can meaningfully influence outcomes. It will examine how IR Days, earnings events, and investor access formats must evolve — from venue selection and hybrid design to digital infrastructure — to ensure engagement remains measurable, inclusive and strategically aligned.

Discussion topics include:

- How the shift toward passive ownership is reshaping engagement dynamics in Canada
- Where IR teams can realistically influence outcomes in a concentrated ownership landscape
- The evolving role of IR Days and capital markets events in strengthening investor relationships
- Venue and format considerations: in-person, hybrid and digital environments
- Leveraging secure, transparent IR technology platforms to enhance participation, analytics and stewardship alignment

Moderator: Steve Wade, head of content, IR Impact

Aurea Dela Resma, corporate director, investor relations, Agnico Eagle Mines

Nicholas Estrela, head of investor relations, Saputo

Jeff Robinson, sales director, Lumi Global

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 dual listing

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

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

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 group, Corbin Advisors
Michael Nikov, senior manager, investor relations, Definity Financial
Mathew Zeppetelli, senior analyst, investor relations and treasury, Alimentation Couche-Tard

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
Cathy Conlon, senior vice president, head of disclosure solutions, Broadridge Financial Solutions
Michele Robitaille, managing director, head of responsible investing, Guardian Capital
Bill Zawada, senior vice president, business development, Laurel Hill

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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. Earning 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 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
Emily Duncan, manager of investor relations, Maple Leaf Foods
Felipe de Souza, senior director, treasury and investor relations, George Weston

2.45 pm **Reframing ESG: aligning disclosure with investor expectations**

As ESG expectations evolve, IR teams are under increasing pressure to move beyond compliance-driven reporting toward a more strategic, investor-aligned narrative. With new disclosure requirements emerging in Canada and growing scrutiny around credibility, the challenge lies in clearly linking sustainability initiatives to financial performance and long-term value creation. This discussion will focus on navigating regulatory complexity, managing differing investor expectations and ensuring ESG communication supports both transparency and valuation.

- Understand how to align ESG disclosure with your broader investment narrative
- Explore evolving Canadian regulatory and reporting requirements and how this may affect your IR strategy
- Learn to balance differing investor expectations on ESG
- Understand how to strengthen credibility and consistency across communications

Moderator: Steve Wade, head of content, IR Impact
Meryem Baskoun, director, sustainability reporting, engagement and quality assurance, Air Canada
Adelaide Chiu, vice president, responsible investing, Beutel, Goodman & Company

3.15 pm **Closing remarks**

3.30 pm **End of conference**