

# IR IMPACT FORUM – AI & TECHNOLOGY

Empowering IROs with thought-leading AI and tech insights

Thursday, November 12, 2026, New York

## AGENDA

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

**8.15 am**      **Registration, refreshments and networking**

**8.55 am**      **Welcome to the forum**

*Steve Wade, head of content, IR Impact*

**9.00 am**      **How IR must adapt to AI-driven markets**

AI is changing how investors find information and it is changing how markets process and react to it. From analyzing company disclosures and investor sentiment to screening potential investments and processing information more quickly, AI is playing a growing role in how markets behave. This creates new challenges for IR teams as messaging moves markets faster, investor attention is increasingly driven by LLMs rather than humans and disclosure practices need to account for increasingly automated information gathering.

This panel examines how AI is reshaping market structure and explores the strategic role IROs will play in helping companies stay relevant, credible and trusted as markets become more AI-driven.

- Discuss how AI-driven analysis of corporate communications might influence trading activity by amplifying short-termism, sentiment swings or overreactions to language, tone and minor disclosure changes
- Explore how the growing use of AI in investment research and portfolio management is changing investor behavior and influencing company valuation
- Discuss how technology is changing the relationship between companies, investors and the capital markets and consider effective techniques to measure factors causing volatility in your stocks
- Identify the new skills, capabilities and data IROs will need to remain effective in these new AI-driven markets
- Consider how the role of an IRO will evolve over the next five years as AI becomes a core part of market infrastructure.

*Moderator: Steve Wade, head of content, IR Impact*

*Amy Gilkes, senior manager, investor relations, Shopify*

*Tim Quast, president and founder, ModernIR*

*Greg Secord, vice president of investor relations, OpenText*

**9.30 am**      **Workshop - Build an AI agent to deliver tailored competitive intelligence**

Monitoring peer earnings calls is essential, but reviewing transcripts manually is time-consuming and generic AI summaries often miss what matters most to your executives. This workshop shows how AI agents can capture transcripts automatically and apply your company's priorities to return tailored insights in minutes. You'll build an agent that can automate executive briefings that combine key call takeaways with market reaction and stock performance, so the people who need that intelligence actually get it.

- Build an agent to automatically capture and process peer earnings call transcripts from your inbox

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- Create tailored prompts that align summaries with your executives' priorities rather than relying on generic AI outputs
- Discover how to create automated executive briefings that combine key competitor updates, share price movements and market reaction into a ready-to-distribute update
- Learn how to configure specialized agents for different markets, sectors and stakeholder groups to deliver more relevant insights.

*Bryan Kloster, director of investor relations, Visa*

## 10.05 am Using AI to enhance market intelligence for more credible investor communications

Investor relations teams are under growing pressure to communicate clearly and respond quickly as AI reshapes the market around them. While generative AI can accelerate content creation, its value depends on the quality of the intelligence behind it and many IROs are finding that weak inputs produce weak output, however capable the model.

This panel explores how IR professionals can combine AI with real-world market intelligence gathered from expert networks and investor conversations to prepare sharper, better-informed communications.

- Discuss the limitations of AI, including why it often misses what investors are actually interested in and learn how AI derived market intelligence can help bridge this gap
- Understand how to use AI to gather, compare and combine the perspectives of expert opinions on market, peer, regulatory and operational issues
- Gain actionable insights to strengthen message credibility by validating AI-generated narratives against insights from trusted experts before communicating with the market
- Build a practical framework for combining AI-powered market intelligence with AI tools to prepare executives for earnings calls, investor days, roadshows and one-on-one meetings
- Learn practical techniques for incorporating expert insights into creating more effective prompts, enabling AI tools to generate relevant and differentiated messaging.

*Moderator: Laurie Havelock, editor, IR Impact*

*Kiera Bridges, senior vice president of investor relations, Moody's Corporation*

*Timothy Brumbaugh, vice president of investor relations, Lear Corporation*

*Arianna Longinotti-Butioni, senior financial analyst, investor relations, Colgate-Palmolive*

## 10.40 am Networking break

## 11.00 am Demonstration - Practical processes for making your corporate story discoverable in an AI-powered world

As investors increasingly use AI-powered search and answer tools to research companies, the rules of content discovery are changing. Traditional SEO is no longer enough. IROs must now consider how AI platforms find, interpret and present corporate information. They must also adapt their communication, provide investors with forward-facing AI tools, and prepare their content and digital channels for an increasingly AI-powered world.

This demonstration will show you how AI can help improve the visibility, accuracy and impact of your investor communications. Through practical examples and real-world use cases, you will see how forward-facing AI, AI agents and AI readiness can help strengthen both the investor experience and the work of IR teams.

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During this demonstration you will:

- See how AI can assess how your IR website and corporate story are interpreted
- Gain an understanding of how forward-facing AI can help investors find accurate answers
- Explore how AI agents can support IR teams in everyday workflows
- Understand how to improve website structure, content discoverability and AI readiness
- Obtain practical insights to reduce reliance on PDFs and improve data accessibility
- Identify actionable website improvements that can be implemented straight away.

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

**11.35 am**

## **Building an effective risk-free agentic AI strategy - lessons from advanced users**

Agentic AI has rapidly moved from experimentation to implementation, helping IR teams streamline earnings preparation, Q&A development, market monitoring and investor engagement. But as adoption accelerates, those efficiency gains must be weighed against compliance and governance demands.

This session looks at how leading IR teams are building and governing AI agents. It shares practical lessons on where agents pay off, where they create risk and how to bring them into existing workflows safely.

- Discover what agentic AI is, how it differs from traditional AI tools and understand what IR functions are seeing the greatest benefits today
- Explore how IR teams determine the correct level of agent autonomy, focusing on when agents can act independently and when human review and approval remain essential
- Best practice when leveraging agents for earnings preparation, Q&A development, peer analysis and investor engagement, while maintaining strict disclosure and regulatory controls
- Hear practical experiences from IROs developing specialized IR agents. Understand what worked, what didn't, how prompts evolved over time and how effective governance frameworks are being established
- Debate if it is better to build one multifunctional agent or multiple specialized agents
- Discover effective ways to integrate agentic AI into established workflows without increasing operational risk.

*Moderator: Steve Wade, head of content, IR Impact*

*Gianni Martenelli, director of investor relations, Mercado Libre*

*Bryan Kloster, director of investor relations, Visa*

*Fatma Mansour, manager, financial analysis, Skycheffs*

**12.10 pm**

## **Demonstration - Managing Consensus in a World of AI**

Consensus estimate management is one of IR's most technically demanding disciplines - and one with direct consequences for how the market values your company. Despite the stakes, the category has remained almost entirely unserved by purpose-built tooling, leaving IR teams to stitch together spreadsheets, broker portals and ad hoc calls. Drawing on decades of experience and primary research with senior IR practitioners, this session explores how AI and agentic workflows are finally changing what's possible.

Key Takeaways:

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- How consensus gaps translate into measurable valuation risk - and why managing them manually is no longer sufficient
- How AI-powered workflows are enabling IR teams to work with the precision and speed the discipline has always demanded but rarely had the tools to support.

*Darrell Heaps, founder and chairman, Q4*

**12.45 pm**

**Lunch**

**1.40 pm**

**Workshop - Using AI to anticipate analyst questions and prepare executives with greater confidence**

The Q&A is where analysts test management's strategy and credibility, which makes it one of the highest-stakes moments on any earnings call.

This workshop shows how AI can help IROs anticipate the likely questions, spot emerging themes and benchmark their messaging against peers before executives face investor scrutiny.

You will leave the workshop having gained hands on experience to -

- Identify the questions analysts are most likely to ask based on historical patterns and current market narratives
- Use peer earnings-call transcripts to understand how competitors are being challenged by investors
- Detect emerging themes that may influence future analyst questioning
- Improve consistency and quality of Q&A preparation while reducing manual research effort.

*Barry Hurewitz, ceo, Enquire*

**2.15 pm**

**Leveraging AI to enhance shareholder analysis and better understand investor intent**

AI is changing how investor relations teams find and prioritize prospective investors, but while AI can unearth new opportunities and automate time-consuming research, good targeting still comes down to pairing strong data with human judgment.

This panel looks at how leading IR teams are using AI to read investor intent more accurately and build engagement strategies that deliver measurable results.

- Discover how to combine quantitative data and qualitative intelligence to identify the right investors, tailor your equity story and prioritise engagement opportunities
- Learn how leading IR teams are integrating AI into their targeting workflows and where automation delivers the greatest value
- Explore how to separate genuine investor interest from broader market activity and respond to changing investor mandates
- Understand how AI can distinguish between low-probability prospects and investors actively evaluating your investment case
- Examine real-world examples of AI transforming fragmented data into actionable targeting intelligence
- Discover how AI can help determine which investors to meet, which conferences to attend and where to focus limited IR resources

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- Understand the data sources, metrics and KPIs that matter most when measuring the success of AI-powered targeting programs.

*Moderator: Steve Wade, head of content, IR Impact*

*Laura Kiernan, vice president of investor relations, Clear Channel Outdoor*

*Jordan Collett, sales engineering manager, Irwin, a Factset company*

**2.50 pm**

## **Staying ahead of activism: how AI is transforming early risk detection and response**

As shareholder expectations shift and activist campaigns grow more sophisticated, IR teams need earlier ways to spot risk before it becomes a public fight.

This panel will explore how AI can help surface early warning signals from shareholder behavior, investor feedback and peer developments, so IROs can engage earlier and with more confidence

- Discuss how AI can help highlight early warning signs that may indicate growing shareholder dissatisfaction and potential activist interest
- Explore how to monitor investors, peers and market trends in real time, enabling more proactive engagement and decision-making
- Use AI to prioritize engagement and focus limited IR resources
- Develop more effective responses and communication strategies
- Understand the strengths and limitations of using AI and consider the role of human judgment.

**3.20 pm**

## **Networking break**

**3.45 pm**

## **Workshop - Unlocking the value of MCPs for IR**

Learn how to securely connect your internal AI tools to external data sources, like S&P Global's Capital Access, using Model Context Protocol (MCP). We'll walk through how this seamless connection turns a standard AI assistant into a highly specialized IR team member, helping you automate tedious workflows, instantly surface investor insights, completely customize your reporting, and get more done in less time.

- What is MCP?: Learn how MCP integrations work and how they can be leveraged by IR teams.
- Natural Language Access: Empower your team and executives to pull shareholder, targeting, and CRM data directly through existing AI tools using everyday language.
- Custom Reporting: Skip the rigid templates to instantly generate fully tailored reports and dashboards.
- Single Source of Truth: Connect your internal and external data sets to build a smarter, more effective AI agent.

*Jonathan Hansen-Granger, associate director, issuer solutions product, S&P Global Market Intelligence*

**4.15 pm**

## **How the buy-side and sell-side are using AI in their analysis**

As more investors use AI to analyze filings, earnings calls and market data, IROs need to understand how these tools reach their conclusions: how they read company messaging, flag risks and compare peers in ways that shape investment decisions.

This session explores how investors are using AI and what it means for the future of investor communications.

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- Learn how investors are using AI to analyze corporate communications and uncover insights that might otherwise be overlooked
- Explore how AI is changing the way investors interpret management messaging, assess credibility and form investment views
- Understand what role AI is playing in identifying risks, opportunities and emerging trends across company disclosures and market information
- Gain practical insights into how AI tools are enabling investors to compare companies and benchmark performance across sectors more quickly and at greater scale
- Discuss what the rise of AI-driven investment research means for IROs and determine how corporate communications needs to evolve to remain effective.

*Moderator: Laurie Havelock, editor, IR Impact*

*Gregg Lampf, vice president of investor relations, Ciena*

*Thaddeus Pollock, executive vice president, head of equities, Mutual of America Capital Management*

*Prabhdeep Sagoo, senior director, market and shareholder intelligence services, Nasdaq*

**4.45 pm**

## **Demonstration - Build your own sell side analyst to stress-test earnings messaging before it reaches the market**

IROs invest enormous effort in crafting earnings narratives, yet how the market sees that story depends heavily on how analysts interpret and retell it. In this session, we'll demonstrate how enterprise-grade AI can be used pre-release to pressure-test prepared remarks by simulating analyst framing scenarios.

Using a guided walkthrough with a baseline case and a 'stress case' scenario, attendees will see how changes in language and tone could influence takeaways. The goal is to help IR teams find the gaps in their narrative and prepare for the questions that tend to follow earnings.

The session will illustrate how to:

- Produce directional, analyst-style read-throughs that flag potential misinterpretations, concerns, and narrative gaps
- Compare different interpretation styles (e.g., validation-oriented vs risk-oriented) and how they can shift emphasis and Q&A priorities
- Run a concise stress test by weakening a key assumption (e.g., demand timing, margin cadence, or guide drivers) to see how messaging resilience changes under pressure
- Identify which disclosures, performance signals, and themes analysts could prioritize vs downplay, and they are more likely to probe in Q&A
- Make a targeted messaging edit and re-test to show how wording relatively small changes can reduce ambiguity and strengthen the narrative.

*This is a decision-support approach to improve preparedness and messaging robustness; it does not predict specific analyst actions, ratings, or market moves.*

*Gregg Lampf, senior vice president of investor relations, Ciena*

**5.15 pm**

## **Summary and closing remarks**

**5.20 pm**

## **Drinks reception**

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6.00 pm

End of drinks reception