

IR MAGAZINE FORUM – AI AND TECHNOLOGY

IRO USE CASES - AI DISCOVERY, IMPLEMENTATION AND USAGE

Thursday, March 13, 2025, 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**

9.00 am **AI and Technology – A year on**

Implementation of artificial intelligence has grown exponentially over the last year and only shows signs of a continued and rapid growth. As the hype from its potential spreads and organizations begin exploring use cases, we take a deep dive into the evolution of this phenomenon.

- Discover how the automation of routine tasks, such as financial reporting and compliance, has become more sophisticated
- Consider the crucial role AI is now playing in managing and reporting sustainability metrics, ensuring compliance with new regulations like the EU's CSRD
- Evaluate the growing emphasis on the ethical use of AI, focussing on the frameworks being developed to ensure transparency, accountability, and fairness in AI application
- Learn how AI tools are being used to deepen engagement with shareholders by providing more personalized and timely communication
- Review how AI-driven predictive analytics are helping IR professionals anticipate market trends and investor behaviour, providing deeper insights into investor sentiment and market conditions.

9.40 am **Workshop – Discover how your peers are effectively using free and easily accessible AI/Tech**

In this hands-on interactive workshop, we will showcase how everyday AI tools can be applied in an investor relations context, to make IR activities more efficient. Some of the tools we will explore include:

- Google Notebook LM
- Claude.ai
- Perplexity

10.20 am **Navigating the different stages of your AI adoption journey; Assessment, implementation and usage**

The transformative capabilities of AI and innovative technologies are becoming more real each day – early understanding and adoption of these technologies is key for IROs to stay current and forge efficient future strategies. This panel will focus on how to ensure all the key issues are considered at each stage of your AI and tech adoption journey.

- Actionable insights into where to start your due diligence, assess where you can competently leverage AI and prioritize where to use it
- Develop an implementation strategy considering key success factors such as clear goals, effective communication, and proper resource allocation
- Assess how to overcome challenges such as resistance to change, lack of expertise, and inadequate training

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- Learn how to foresee and address risks and regulatory concerns by efficiently aligning with your legal, compliance, and security teams
- Consider best time lines for continual training, upskilling and gathering feedback for continual growth
- Discuss the best prompts to use to get a relevant and reliable answer.

11.00 am **Networking break**

11.30 am **Workshop – Embracing AI for enhanced investor targeting**

In the dynamic financial landscape, investor relations professionals are always on the lookout for novel methods to connect with the most suitable investors. The emergence of AI has introduced groundbreaking possibilities in investor targeting, providing advanced yet accessible solutions. This workshop will demonstrate that integrating AI technologies into your outreach strategies can lead to higher engagement levels, increased funding, improved efficiency and improved outcomes.

12.10 am **Using AI in a secure and accurate way**

Integrating AI into investor relations can offer significant benefits, but it also presents several challenges, particularly around security and accuracy.

In this panel we will look at how we can carefully balance leveraging AI's capabilities while ensuring robust data governance, regulatory compliance and maintaining human oversight.

- Understand how poor data quality or biased data can lead to inaccurate insights and decisions; and review the frameworks available to overcome these challenges
- Remain compliant in a complex regulatory environment, learn how the AI act, market abuse and data protection regulations will shape your approach to responsible AI usage
- Assess what measures you can implement to ensure data privacy and protection against cyber threats
- Evaluate the need for human oversight in validating AI-generated insights.

12.50 pm **Lunch**

1.50 pm **Workshop – Leveraging AI and technology to customize earnings call communications for investor insights**

In this hands-on session, you will use AI-powered sentiment and tone analysis tools to analyze earnings presentations scripts and experience how to adapt your language, presentation and feedback based on how investors evaluate your use of language when announcing financial results.

2.30 pm **Reading the room: What do investors need from IROs?**

Investors are increasingly using AI and Technology for tasks ranging from analysis to portfolio construction. To keep up with the rapid adoption of technology by the buy-side, IROs need to leverage a new wave of AI and technology tools to ensure they remain in sync. This session explores how investors use AI, its impact on IR teams, and how to adapt your IR program accordingly.

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- Learn how the buy-side uses AI and innovative tech to help make investment decisions, evaluate ESG performance and impact trading
- Gain practical advice on the information investors want from IROs, in what form and through which channels
- Consider the data investors use to identify a portfolio that fits their specific needs, including their risk tolerance and time horizon
- Hear actionable insights on optimizing your communications and disclosure strategies
- The rise of the robo-advisor – help, hinderance or the future?

3.10 pm **Workshop – The ultimate guide to maximizing the use of AI and technology in digital communications**

In this interactive workshop you will discover what a modern, automated digital communications strategy looks like and how to fully integrate it into your IR strategy, to ultimately help your company better attract, engage, and retain their most important stakeholders.

3.40 pm **Networking break**

4.10 pm **Workshop – Discover how your peers are effectively using free and easily accessible AI/Tech**

In this hands-on interactive workshop, we will showcase how everyday AI tools can be applied in an investor relations context, to make IR activities more efficient. Some of the tools we will explore include:

- Gemini
- ChatGPT

4.40 pm **What next for AI in 2025: Challenges and opportunities**

AI and innovative technology are no longer just futuristic concepts. These advancements will help IR professionals stay ahead of the curve, making their work more efficient and impactful. Additionally, as AI helps technology developers build out their capabilities, the rate development will increase rapidly, so it has never been more important to evaluate your needs and solutions. For this reason, IROs need to fully understand its future capabilities and wholeheartedly embrace them.

Here we explore what's next for AI, why it matters, and how it will continue to impact the role of an IRO.

- Debate the effect geopolitics will have on regulations, and data privacy
- Discuss how security can keep pace with the rapid progress of AI development
- Examine the need for upskilling workforces. Focussing on identifying new skills and implementing the required training — for example, prompt engineering, AI ethics, and AI literacy
- Discuss how IR teams can maximize the benefits of their efficiency savings.

5.10 pm **Closing remarks and drinks reception**

6.00 pm **End of drinks reception**

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