

IR FORUM – AI AND TECHNOLOGY EUROPE

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**

The implementation of AI 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 its 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.

Nick Stone, senior vice president, head of investor relations, Fresenius

Isabel Vilela, head of investor relations and corporate communications, GoviEx Uranium

Irina Zhurba, director of investor relations and sustainability, Mister Spex

9.30 am **Workshop – AI-powered research tactics, competitive intelligence and analysis**

In this session you will use AI and innovative technology to –

- Summarize an analyst note for management
- Write a weekly email for management
- Prepare for a conference Q&A session
- Analyze a slide of data to generate speaking notes.

Bryan Kloster, manager investor relations, AutoNation

10.10 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 to forge efficient

IR FORUM – AI AND TECHNOLOGY EUROPE

IRO USE CASES - AI DISCOVERY, IMPLEMENTATION AND USAGE

Thursday, March 13, 2025, London

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

Claudia Thome, senior vice president investor relations, CompuGroup Medical
Müge Yücel, director of investor relations & sustainability, Galata Wind

10.40 am **Networking break**

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

In the dynamic financial landscape, IR professionals are always on the lookout for novel methods to connect with the most suitable investors. The emergence of AI has introduced ground-breaking 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.

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

Integrating AI into IR 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 low-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 and 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.

IR FORUM – AI AND TECHNOLOGY EUROPE

IRO USE CASES - AI DISCOVERY, IMPLEMENTATION AND USAGE

Thursday, March 13, 2025, London

Fredrik Erlandsson, head of corporate communications and investor relations, NIBE
Yvonne Harley, director of investor relations and sustainability, NCC Group

12.20 pm **Leveraging AI and Platform to elevate IR: Demo**

Join Tanya Thomas, EVP EMEA at Q4, as she explores how artificial intelligence is reshaping IR to drive exceptional outcomes. The session will kick off with an overview of the Q4 Platform, highlighting how IROs benefit from consolidating their tech stack to achieve increased data accuracy and deeper insights.

- Discover how AI enables smarter decision-making, improves efficiency, and uncovers opportunities through advanced data analysis and trend identification.
- Get an exclusive first look at Q4's beta AI dashboard on the Q4 Platform, designed to handle the heavy lifting, providing powerful data analysis and delivering actionable insights so you can focus on achieving high-impact IR strategies.

Tanya Thomas, executive vice president, EMEA, Q4

1.00 pm **Lunch**

1.00 pm **Optional breakout roundtable, led by Q4 – Pioneering the Future of IR: innovators, disruptors & visionaries**

Q4 is hosting an exclusive private lunch bringing together the most forward-thinking minds in Investor Relations—If you are just starting on your AI journey or are already using these innovative tools this workshop is tailored for you.

With the aim of producing the leaders who will redefine the industry by using cutting-edge technology, data-driven strategies, and bold new approaches. This intimate gathering will foster high-level discussions on how IR professionals can assess what tools are available, efficiently leverage AI and automation, and reimagine engagement in an increasingly digital-first world.

- The tech-driven future of IR - How AI, automation, and predictive analytics are transforming investor engagement
- Breaking the traditional mold - Pioneering new strategies in corporate storytelling and investor communication
- The rise of digital-first IR - Embracing virtual events, social media, and innovative investor outreach tools
- Measuring what matters - Consolidating the IR tech stack and Increases data-driven decision-making in IR and the KPIs that define success lessons from the trailblazers - case studies of bold IR initiatives that have reshaped investor relations

Tanya Thomas, executive vice president, EMEA, Q4

IR FORUM – AI AND TECHNOLOGY EUROPE

IRO USE CASES - AI DISCOVERY, IMPLEMENTATION AND USAGE

Thursday, March 13, 2025, London

2.00 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.

- Understand how AI quantitatively measures language and how to optimize language for these scores
- Identify areas of disconnect between human comprehension and NLP scoring of language
- Test the impact of word and phrase choice on the scoring of an earnings call.

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

2.40 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

- Learn how the buy-side uses AI and innovative technology to help make investment decisions, evaluate ESG performance and impact trading
- Using AI to understand investor concerns and how to tailor your communications more effectively
- Gain practical advice on the information investors want from IROs, in what form and through which channels
- Best practices for ensuring investors can quickly access public information in a self-serve format
- Understand how to efficiently integrate AI into your website
- 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?

David Grunfeld, founder and CEO, aiiro AI

Ross Hawley, head of investor relations, ZIGUP

Stefanie Mollin, co-portfolio manager – global equities, GIB Asset Management

3.20 pm **Networking break**

3.50 pm **Workshop – Discover how your peers are effectively using free and easily accessible technology**

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:

IR FORUM – AI AND TECHNOLOGY EUROPE

IRO USE CASES - AI DISCOVERY, IMPLEMENTATION AND USAGE

Thursday, March 13, 2025, London

- Gemini
- ChatGPT

4.25 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 of 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.

4.55 pm **Closing remarks and drinks reception**

6.00 pm **End of drinks reception**