Artificial Intelligence and the Use of Social Media for IR

Harnessing Artificial Intelligence and
Social Media for Effective Financial Communications

I am a subtitle

A virtual classroom organised by

Academy

25 and 26 June 2024

EURONEXT
CORPORATE SERVICES

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Academy – Euronext Group

At Academy we aim at sharing **capital markets expertise** by turning it into world-class training courses and programmes.

Our programmes reflect the evolution and trends of **financial markets and their eco-systems**.

Key assets of our learning centre are our centrality in capital markets, and our **internal and external faculty**, whose contributors are drawn from practitioners, academics, advisors and financial market specialists.

As an Exchange system, being at the centre of financial markets, we understand not just what happens now, but also what's changing - so we can design our courses to equip you for the world of today and tomorrow.

An accredited Management System Certificate

Academy meets the management system standards UNI EN ISO 9001:2015, sector EA:37 since 2007.

The accreditation guarantees internationally recognised quality service standards and allows companies to apply for public funding to finance individual and company training projects.





Upcoming courses

Investor Relations Foundamentals
8, 9, 15, 16 and 22 October 2024, virtual classroom

Check our courses calender here.

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Programme overview

Background

The investor relations landscape has drastically changed. The growing number of issuers, fully digitised investor communications, and fragmented online channels are requiring IR professionals to adopt technology in order to get the word out, become more efficient, and cultivate investor attention and trust.

A new challenge for IR teams is artificial intelligence (AI). Can it brief efficiency and effectiveness to IR processes? Or is there a cost of caution being ignored?

This training session is tailored for investor relations managers aiming to harness the power of artificial intelligence (AI) and social media in their financial communications strategies.

Description

The first half-day session emphasizes the importance of understanding AI's role in maintaining transparency, accuracy, and engagement with stakeholders in an evolving landscape. Through a structured framework, interactive discussions, and real-world case studies, participants will grasp the potential of AI tools in optimizing financial communications, improving decision-making processes, and bolstering investor confidence.

The second half-day session explores community-building techniques, leveraging investment communities on social media, and maximizing the impact of newsletters for delivering timely updates to stakeholders.

Key take-aways

Session 1 – AI for IR

How can investor relations managers effectively integrate artificial intelligence into their financial communications strategies to enhance stakeholder engagement and decision-making whilst understanding limitations and downsides?

After completion, participants are expected to:

Knowledge	1. Understand the fundamental concepts and applications of artificial intelligence in the context of financial communications. 2. Identify AI tools and technologies relevant to investor relations and their respective functionalities. 3. Comprehend the ethical considerations and regulatory frameworks associated with AI implementation in financial communications.

Skills	1. Develop proficiency in researching needs and solutions of AI-driven tools for communication purposes. 2. Be able to oversee the implementation of AI-powered automation solutions to streamline routine investor relations tasks, such as report generation and data analysis. 3. Cultivate the ability to interpret AI-generated insights and translate them into meaningful narratives for stakeholders.
Attitude	1. Cultivate a proactive mindset towards embracing AI as a complementary tool in enhancing financial communications effectiveness. 2. Foster a commitment to maintaining transparency and accountability while leveraging AI technologies in investor relations practices. 3. Embrace a continuous learning ethos to stay updated with evolving AI trends and best practices in the field of financial communications.

Session 2 – Social media for IR

This introductive session is designed to equip delegates with:

- the tools and strategies necessary to uplift your engagement efforts and maximize your impact in the digital landscape
- a good understanding of the diverse social media platforms to mastering content creation, community-building, and data analytics, you will gain invaluable insights and practical skills to enhance your investor relations strategy
- the essentials of leveraging social media platforms to engage with investors, shareholders, and industry influencers.
- The skills to create captivating content that resonates with your target audience, navigate the intricacies of different social media platforms, and harness the power of data analytics to optimize your IR approach.

Who should attend

The programme has been designed to appeal to the following professionals:

- Investor Relations Managers
- Investor Relations Officers
- Media Relations Managers
- Corporate Communications Managers

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Faculty

Bart Verhulst
CommTech Enterpreneur

Olivier A. de Goeij
Community Manager
HC Andersen Capital

Daniel J. Bertelsen
Digital Marketing Manager
HC Andersen Capital

Tue Østergaard
Chief Executive Officer
HC Andersen Capital

Methodology

Learning tools

The workshop will take place on Teams.

Learning material

The course material will be provided to the delegates in pdf format the day after the course has taken place.

Certificate of attendance

The certificate of attendance will be sent in digital format after the end of the course.

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Course Agenda

25 June 2024

9:30am – 1:00pm CEST

9.20 ***Welcome and introduction to course objectives***

9.30 Introduction to AI

- AI basics
- AI Strategy and Governance
- Economics of AI
- Risks with AI: Manipulation, Data Protection, Fairness, and Explainability

10.15 AI for investor relations

- The challenges of a modern IR Team
  - Information inflation
  - Workforce shift
  - Content integrity
  - AI literacy

11.00 Coffee break

- AI and the buy-side
- AI and the sell-side
- Predictions for AI's influence on IR

12.00 Examples and discussions

- 2 case studies

Bart Verhulst
CommTech Enterpreneur

13.00 Close of day 1

26 June 2024

9:30am – 12:30pm CEST

9.30 The use of Social Media for IR

- Introduction to Social Media for Investor Relations
- The Different Social Media Platforms
- How to Get Started on Content Creation

10.45 Coffee break

11.00

- Using and Understanding Investment Communities
- Mastering Newsletters
- Data & Analytics for Monitoring Your Social Media Presence
- Key Takeaways

12.30 Course close

Olivier A. de Goeij
Community Manager
HC Andersen Capital

Daniel J. Bertelsen
Digital Marketing Manager
HC Andersen Capital

Tue Østergaard
Chief Executive Officer
HC Andersen Capital

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Terms and conditions

The registration form is a legally binding agreement between Euronext Corporate Services Italy S.r.l. and the applicant (or the company the applicant works for) and is defined by the following conditions:

Virtual classroom schedule

25 and 26 June 2024 | 9:30 am – 1:00pm CEST

Registration

The applicant can submit the registration form, duly filled out, to Academy 7 days prior to the course date via:

- **EMAIL** academy@euronext.com
- **WEB** Academy website

To register after this date, please contact the following phone number:

- **TEL +39 02 72426.086**

Participation will be confirmed in writing by the Academy administration.

Registration fee

The individual registration fee is € 980 + 22% VAT (if applicable).

The fee includes the course materials in pdf format.

Discounts

Multiple registrations - Discounts are available for multiple registrations of the same company. In particular:

- Two participants: 10% discount on the total amount
- Three participants: 15% discount on the total amount

NEVIR member: 20% discount on the individual registration.

Payment method

Fees must be paid:

- Upon receipt of the email from Academy confirming the applicant's registration (sent approximately 7 days prior to the course date)

or

- Upon receipt of the invoice from Euronext Corporate Services Italy S.r.l. (Academy is part of the Euronext Corporate Services Italy S.r.l. Company)

Payment must be made via **BANK TRANSFER** to:

Euronext Corporate Services Italy S.r.l.
P.zza degli Affari, 6
20123 Milano
Tax Code **11734560961**
VAT No. **IT11734560961**

Intesa San Paolo S.p.A.
P.zza Cordusio, 4
20123 Milano

IBAN **- IT22 N030 6901 6261 0000 0125 565**
BIC - **BCITITMM**

A copy of the bank transfer must be emailed to Academy at academy@euronext.com.

An invoice will follow and will be sent to the email addresses given on the booking form.

Intellectual property rights

The Client acknowledges and agrees that the contents made available during the training (including, but not limited to, videos, pictures and texts) are property of Euronext Corporate Services Italy S.r.l. or are supplied by Euronext Corporate Services Italy S.r.l. in virtue of certain contractual arrangements with third parties and cannot be reproduced, distributed or used for business purposes without the prior written consent of Euronext Corporate Services Italy S.r.l. or the entity having the relevant rights on the same.

Liability

Whilst every effort is made by Euronext Corporate Services Italy S.r.l. to ensure that the contents of the training (including, but not limited to, videos, pictures and texts) are accurate and up to date, Euronext Corporate Services Italy S.r.l. shall not be liable whatsoever for any inaccuracy or misleading information, nor for any consequential damage or expense or any loss of profit or any liability to third parties incurred as a result of reliance

on such information, which is provided for educational purpose only. Euronext Corporate Services Italy S.r.l. total liability under this agreement shall be limited to the maximum amount represented by the Fees paid to the latter by the Client.

Traceability of financial flows

Euronext Corporate Services Italy S.r.l. and the Client assume all obligations regarding the traceability of the financial flows provided by Law 136/2010, as subsequently amended and implemented (the "Traceability Obligations").

In relation to the payments to be made pursuant to the present Contract, the Client, if it is a public contractor pursuant to decree law 163/2006 (Code of public contracts for works, services and supplies), to ensure the enforcement of Law 136/2010 and subsequent amendments, undertakes to communicate to Euronext Corporate Services Italy S.r.l., by the form attached to the Contract, the identification bidding code (CIG) and, in case, the unique code of project (CUP).

In particular, in fulfilling the Traceability Obligations Euronext Corporate Services Italy S.r.l. will communicate to the Client:

(i) the bank accounts details to be used, also nonexclusively, for the payments to be made by the Client pursuant to the present Contract;

(ii) the personal details and the fiscal code of the persons delegated to operate on them, indicating the relevant role and powers, within 7 (seven) days from the creation of the accounts above (or, in case of existing accounts, within 7 (seven) days from their first use in relation to the payments made by the Client).

(iii) Any possible amendment of the information indicated in points (i) and (ii) above, will have to be communicated by the Client within 7 (seven) days from occurrence.

Let it be understood that, save for possible derogations and partial exemptions to Law 136/2010, failure to use instruments suitable to permit the full traceability of the financial flows (for instance, bank or post transfer) and the failure to comply with any other Traceability Obligations, are ground to terminate the present Contract.

Euronext Corporate Services Italy S.r.l. undertakes, in particular, to inform the Client and the Prefecture (territorial office of the Government of the province where the Client has its registered office) if it becomes aware of breaches by its contractual counterparties, if any, in relation to the Traceability Obligations.

Cancellation Policy

According to article 1373 C.C., to withdraw from this contract applicants must send a written notice via email to academy@euronext.com:

— The fee will be fully refundable up to 7 working days prior to course date.

— A 50% refund will be provided for cancellations made during the 6 days leading to the course,

— Fees are non refundable for cancellations made 1 day prior to the course date.

Substitution of attendee (from the same company) may be made at any time.

Academy accepts requests to replace the course with another Academy course. The rescheduled training must take place within 12 months.

Changes to the program

Euronext Corporate Services Italy S.r.l. reserves the right to postpone or cancel the course and notify the participant via fax or email at least 1 week before the course date; in this case, the participant is entitled only to a full refund of the course fee. In addition, Euronext Corporate Services Italy S.r.l. is entitled to make changes to the programme and seat of the training and/or substitute the expected panellists with others with equal skills and competence.

Governing law and jurisdiction

The present agreement shall be governed by Italian law. The parties assign to the Court of Milan the exclusive jurisdiction over any dispute arising out the present agreement, this including – but not limited to – any proceedings regarding the validity, the construction, the performance and/ or the termination of the agreement.

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Booking form

Please read the terms and conditions on the previous page.

Fill out the form and send email to academy@euronext.com.

For further information +39 02 72426086 – academy@euronext.com

Artificial intelligence and the use of Social Media for IR

Virtual Classroom – 25 and 26 June 2024

REGISTRATION FEE		
Individual		☐ € 980 + 22% VAT (if applicable)
2 participants	**10% discount**	☐ € 1,764 + 22% VAT (if applicable)
3 participants	**15% discount**	☐ € 2,499 + 22% VAT (if applicable)
NEVIR members	**20% discount**	☐ € 784 + 22% VAT (if applicable)

PARTICIPANT INFORMATION			
Name and Surname			
Jop title			
Company			
Email		Phone	
Job Field			**Knowledge level of the subject**
☐ General Management	☐ ICT	☐ ESG and Sustainable Business	☐ Basic
☐ HR, Organisation and Development	☐ Legal	☐ Finance	☐ Intermediate
☐ Administration and Control	☐ R&D	☐ Risk Management	☐ Advanced
Nature of business			
☐ Listed/unlisted company	☐ Bank	☐ Advisory	☐ Energy
☐ Lawyer	☐ Investment Bank	☐ Private Equity	☐ Funds
Company Address			
Street	N.	Zip code	City	Country

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BILLING INFORMATION
The invoice must be addressed to:

Company name/Participant name and surname				
VAT number			Department	
Billing reference name				
Street	N.	Zip code	City	Country
Phone			Email	

ELECTRONIC INVOICE (IF APPLICABLE)

According to the Italian Law no. 205 of 27.12.2017 and to Provision no. 89757 of 30.4.2018 of the Italian TAX Authority and subsequent amendment and/or integrations, the Client duly holder of an Italian VAT code/Tax identification code) provides with:

Certified Email Address (PEC):

Or Recipient Code:

In order to receive the electronic invoice through the Italian Exchange System (SDI) according to the above information

Phone **Email**

SPLIT PAYMENT (IF APPLICABLE)

According to the art. 17-ter of the Italian D.P.R. no. 633/72 (as subsequently amended and implemented), the Client (duly holder of an Italian VAT code/Tax identification code) declares that:

☐is subject to the "Split Payment" VAT regime ☐ is not subject to the "Split Payment" VAT regime

and undertakes to communicate any change of such regime.

PRIVACY

By signing this booking form I declare that I have read the informative document regarding the processing of personal data on the Euronext Corporate Services's website (Privacy Policy | Euronext Corporate Services) and I accept the General Terms and Conditions of the service.

In addition to the declaration above, by ticking the relevant box I also inform that *(please tick the chosen box)*:

☐ I DO ☐ I DO NOT
authorize Euronext Corporate Services to collect and to process my personal data for the purpose of "direct marketing", by sending advertising material, direct sales and promotion of products and services of Euronext Corporate Services, carrying out market research, marketing communications, also using data subject's name for publicity carried out through automated means of contact such as e-mail, fax messages, mms or sms.

☐ I DO ☐ I DO NOT
authorize the communication/the transfer of the personal data for the purposes of direct marketing by third parties - even outside the European Community - included the other companies of the Euronext Group, as well as third parties referred to in point c) of the informative document regarding the processing of personal data (Privacy Policy | Euronext Corporate Services).

Signature and company seal **Date:**

Academy

Comprehensive, quality education is fundamental for the development and growth of the economy. As part of a pan-European market infrastructure at the centre of European capital markets, Academy's main objective and activity is turning capital markets expertise into world-class training courses and programmes and making them relevant to the wider financial community of today and of tomorrow. Key Academy assets are our centrality in capital markets, and our internal and external faculty, made up of practitioners, academics, advisors and financial market specialists. Interactive and innovative learning methods make all Academy programmes an inspiring experience.

Contacts

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