

How AI and Differentiated Data are Transforming Investor Relations and Corporate Strategy

6 Key Takeaways from our 2025 Webinar



Webinar Overview

The webinar, moderated by Carmen Lilly, featured a distinguished panel from S&P Global Market Intelligence: Chris Blake, Eric Hanselman, and David Murdock. The session aimed to explore how artificial intelligence (AI) and differentiated data are reshaping investor relations (IR) and corporate strategy.

The discussion encompassed innovative practices, the challenges faced by organizations, and potential future trends in the use of AI within the corporate landscape.



Carmen Lilly (Moderator)

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Development
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Chris Blake

Executive Director of
Product Innovation
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Eric Hanselman

Chief Analyst
451 Research



David Murdock, CFA

Vice President
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Visible Alpha

6 Key Takeaways from the Panel Discussion

1. AI in Investor Relations

Mainstream Adoption: The term "AI" has gained widespread recognition, and its applications have expanded significantly over the past 18 to 24 months. Various forms of AI, including generative AI, machine learning, and natural language processing, are now being integrated into IR workflows, allowing teams to analyze vast amounts of data and improve communication with stakeholders.

Buy-Side Utilization: Buy-side firms have been at the forefront of incorporating AI into their processes. They use AI for sentiment analysis of corporate communications,

which helps them assess the tone and clarity of earnings calls, press releases, and other investor communications. This analysis enables investors to gauge market sentiment and make informed decisions based on the perceived performance of companies.

2. Buy-Side Applications

Sentiment and Language Analysis: Buy-side firms utilize AI to analyze sentiment, language complexity, and numeric transparency in corporate communications. Metrics such as net positivity, language

complexity (reading grade level), and numeric transparency (frequency of numerical data) are crucial for understanding how a company's communications are perceived in the market.

Efficiency Improvements: AI tools are particularly effective in summarizing large volumes of data, which enhances efficiency in IR processes. This capability allows IR teams to quickly distill essential information from earnings transcripts, research reports, and other lengthy documents, enabling them to focus on strategic decision-making.

3. Best Practices for IR Teams

Experimentation with AI: IR professionals are encouraged to experiment with AI tools as a starting point. One practical approach is to use AI for summarizing public information, such as peer earnings calls or market reports. This hands-on experience can help teams understand AI's capabilities and limitations.

Optimizing Communication: The panel emphasized the importance of optimizing word choice in communications. Utilizing simpler language and incorporating numerical data where appropriate can enhance clarity and improve sentiment scores. For instance, using specific percentages instead of vague terms (e.g., "high single digits" vs. "7% to 8%") can provide clearer insights to investors.

4. Data Quality and Governance

Importance of High-Quality Data: The success of AI implementation hinges on the availability of high-quality data. Organizations must prioritize data security, accuracy, and governance to ensure that the AI models produce reliable outcomes.

This includes understanding the nature of the data being used and ensuring it is timely and relevant.

Integration of Datasets: Combining internal and external datasets is vital for comprehensive analysis. For example, during earnings preparation, IR teams can benefit from integrating consensus estimates, ownership information, and sentiment analysis to create a holistic view of the company's performance.

5. Future Trends

Generative AI Applications: The use of generative AI for content creation and analysis is on the rise. While this technology offers significant potential for efficiency, companies should approach it cautiously. Transparency about AI usage in communications is essential to maintain trust with stakeholders.

Continuous Learning: As AI technologies evolve rapidly, organizations must engage in ongoing experimentation and be willing to adapt their strategies. This includes staying informed about the latest developments in AI and exploring new use cases that can enhance workflows.

6. Panel Insights

Collaboration with Legal Teams: The panelists highlighted the importance of collaborating with legal and compliance teams when integrating AI tools into workflows. This partnership ensures that the use of AI aligns with regulatory requirements and best practices.

Human Oversight: Maintaining human oversight in AI-generated outputs is crucial to mitigate risks and uphold the credibility of communications. The panel stressed that while AI can enhance efficiency, it should

not replace the human element in decision-making and content creation.

Conclusion

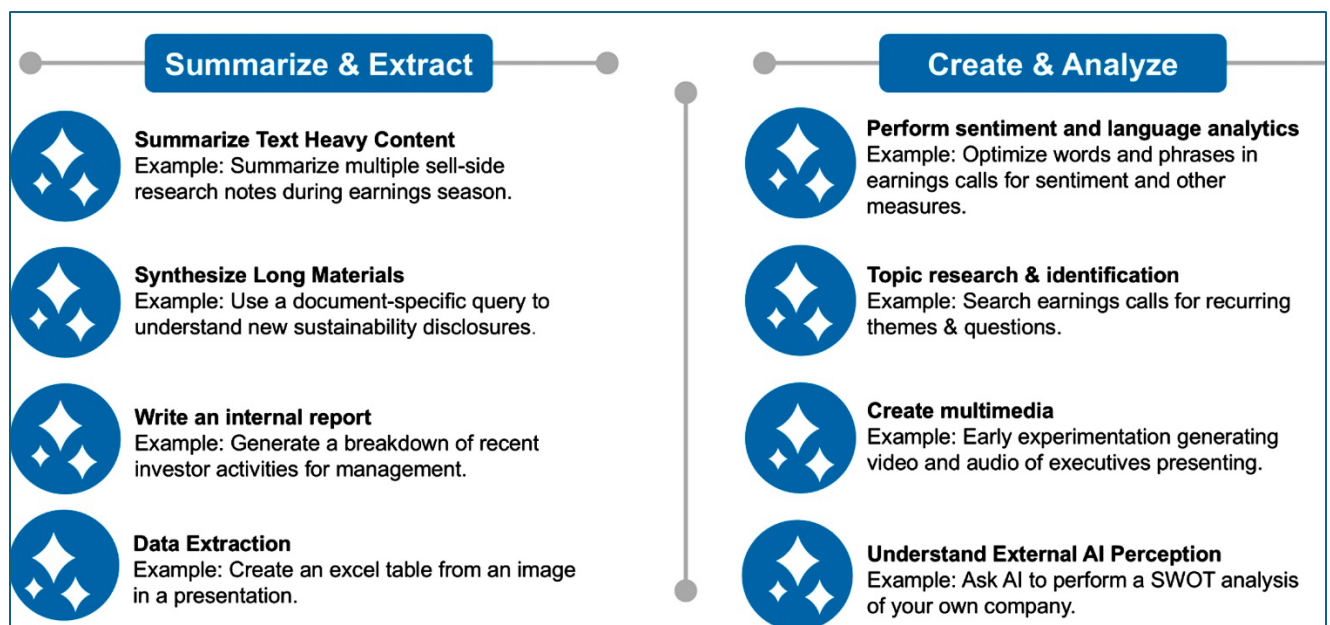
The webinar concluded with practical steps for IR teams to start leveraging AI

effectively. Key recommendations included focusing on data governance practices, identifying specific pain points for efficiency improvements, and experimenting with AI tools to enhance workflows. By taking these steps, IR professionals can harness the power of AI to drive better insights and strategic decision-making within their organizations.

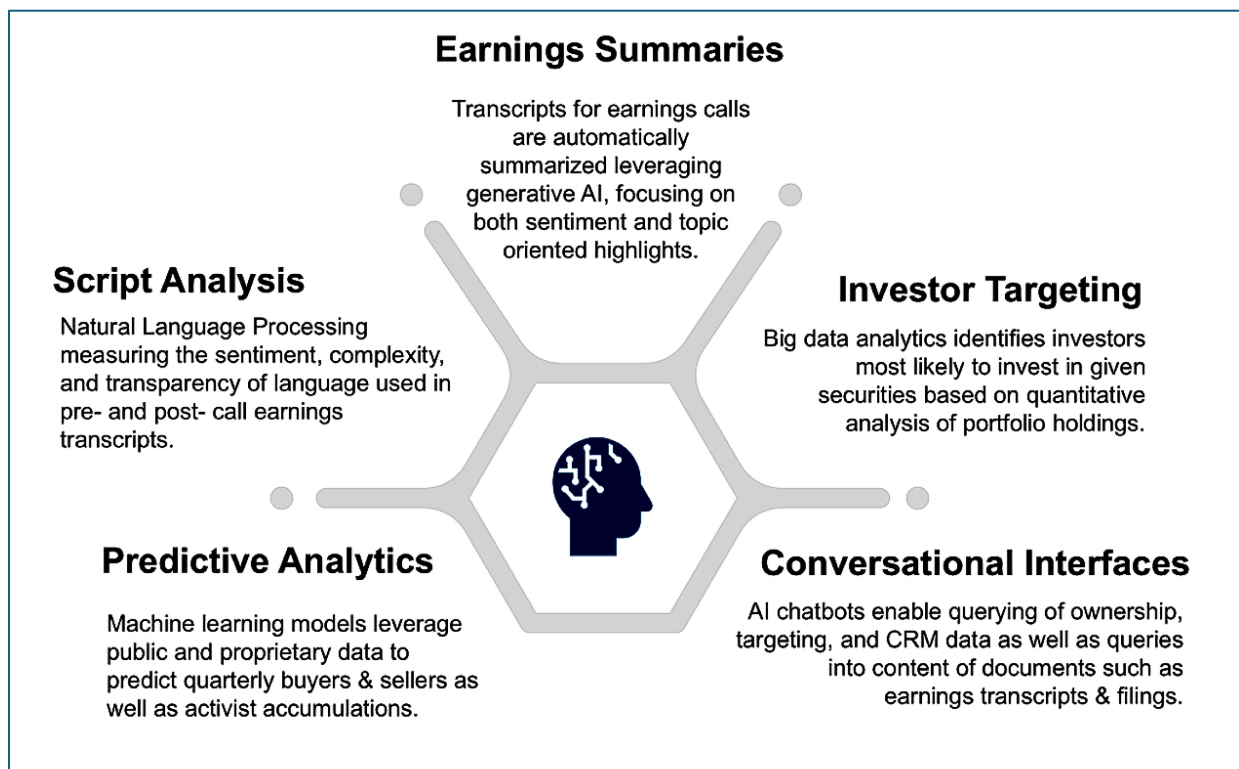
Supporting Charts, Analysis and Insights

How Are IROs and Strategy Teams Leveraging AI?

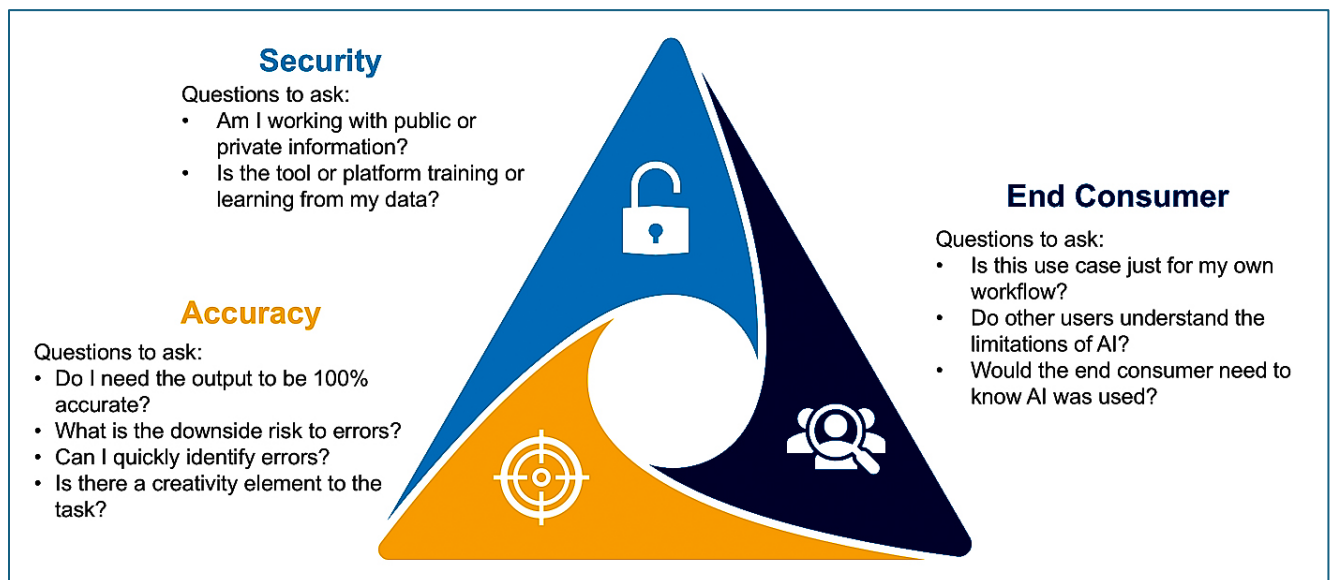
IR Team AI Use: How Innovators are Incorporating



Powering IR Workflows: How S&P Global is Leveraging AI

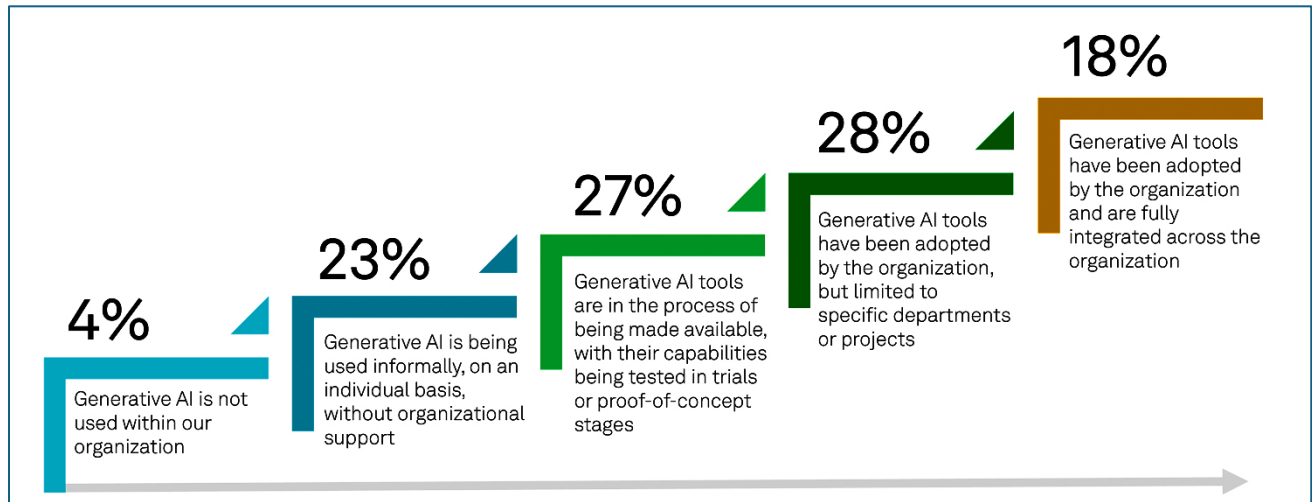


IR Team AI Use: Key Considerations



What's on the horizon for AI implementation?

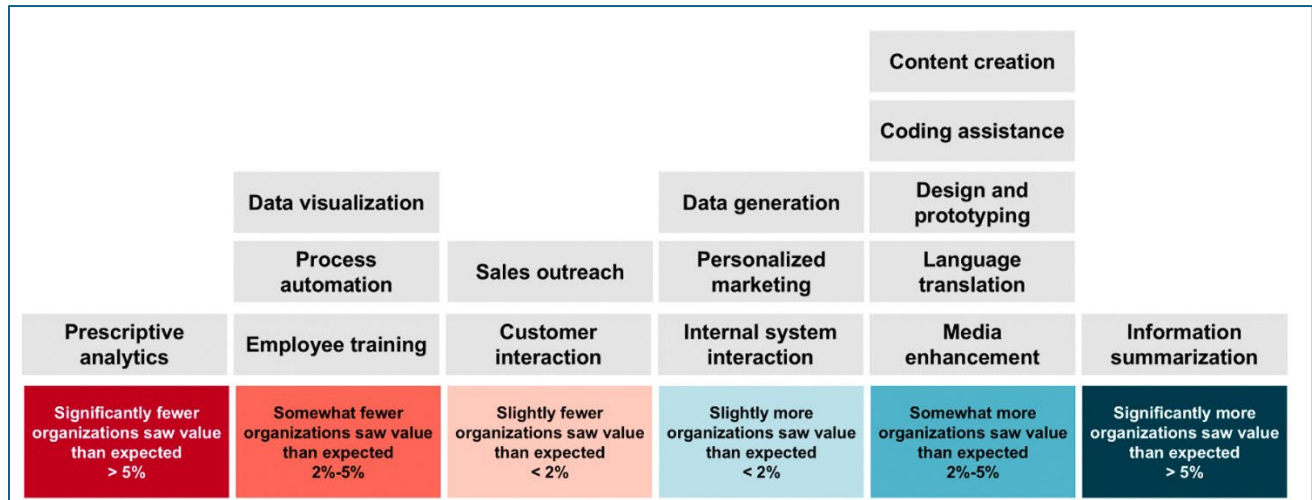
GenAI Deployments are Still in Early Days



Q. Which of these statements most accurately reflects the use of generative AI at your organization?

Base: All respondents (n=712). Source: 451 Research's Voice of the Enterprise: AI & Machine Learning, Infrastructure 2024.

Information Summarization Delivered Value to More Organizations than Expected



Q. Over the past 12 months, in which of the following areas has generative AI provided meaningful value to your organization, if at all? Please select all that apply. Base: GenAI is in use (950). Source: 451 Research's Voice of the Enterprise: AI & Machine Learning, Use Cases 2025.

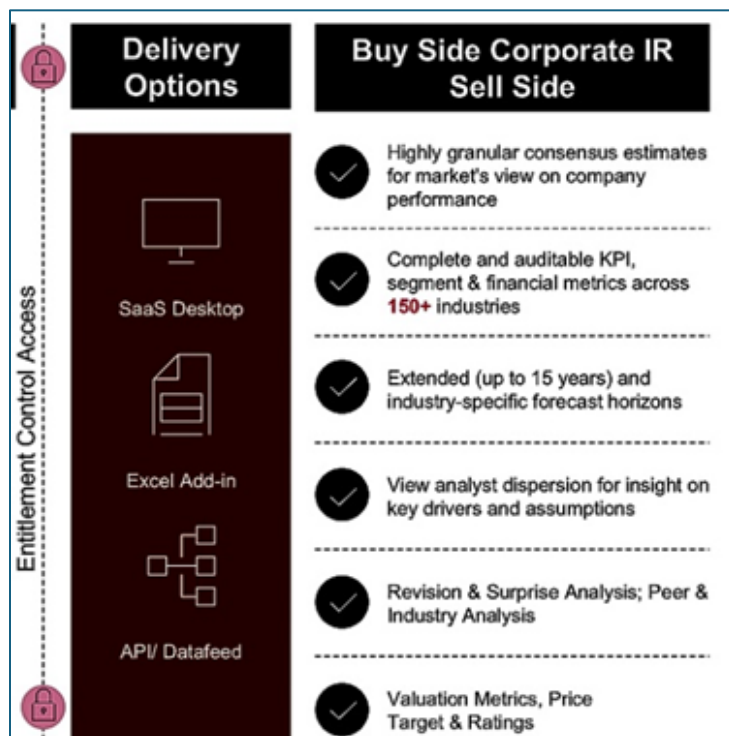
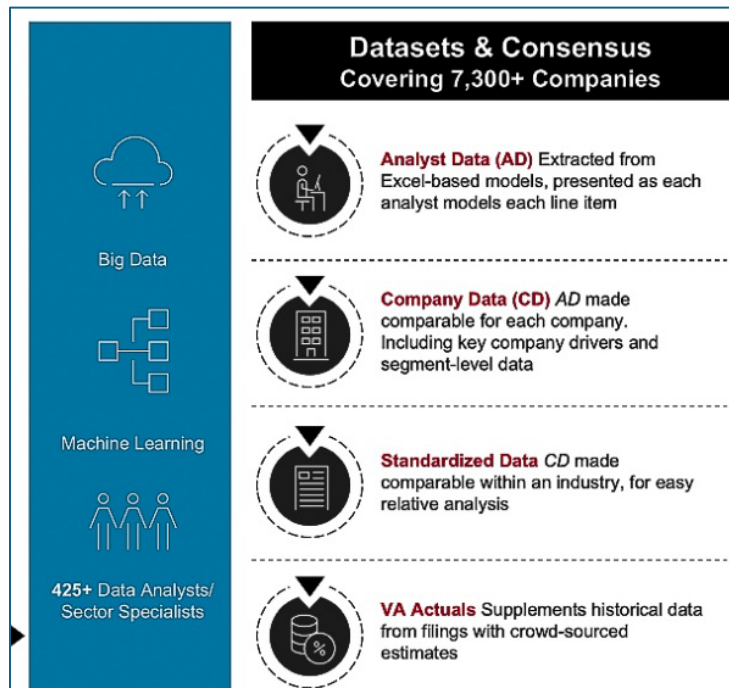
Q. Looking ahead to the next 12 months, in which areas do you expect generative AI to provide meaningful value to your organization? (Select all that apply, including areas where it is already providing value) Base: Organizations that use generative AI or plan to (953).

Source: 451 Research's Voice of the Enterprise: AI & Machine Learning, Use Cases 2024.

Visible Alpha Overview

Full working models and revisions from 200+ sell side firms

Industry/ Regulatory Research, Events. Filings, Market Data, etc.



Full On-Demand Webinar Replay

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<https://www.spglobal.com/market-intelligence/en/campaigns/accelerate-with-ai>

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