

AI White Paper

How Investor Relations professionals
can derive value from AI

Modular Finance
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Introduction

There is no day like the other for IR professionals. They need to manage a vast amount of data and insights surrounding markets, shareholders, peers and much more. **AI is a great tool to make all of these responsibilities more manageable and more insightful.**

In a survey we carried out earlier in 2025, we found that 80% of investor relations teams have already begun adopting AI, mainly for tasks such as copywriting or summarising. To us, that is only scratching the surface of what AI can offer IROs. **Very few have started to apply it where we believe the real value of AI lies: automating tasks and using AI in connection with the CRM and shareholder data.**

Through ongoing conversations with our customers, we have shaped our roadmap of AI features around the areas where IROs themselves see the greatest potential for impact.

In this white paper, we will highlight concrete use cases and the features we have developed so far, to help IROs free up time and gain more insight through AI.

About Modular Finance

Modular Finance is a fintech company that develops software products for investor relations teams. Our goal is to deliver top-tier data, intuitive user experiences, and the full range of features IR professionals need. Today, we are proud to serve more than 800 publicly listed companies across the UK and the Nordics.

In this paper, we focus on features in our Investor Relations Platform, Monitor. Monitor combines Share Register Analysis with Investor CRM tools.

AI for Investor Relations: Use Cases and Features

Logging Meeting information

Inputting meeting details, such as time, date, and participants, may feel repetitive and, for many, is time-consuming. Yet, logging this data forms the foundation for analysing and following up on an IR team's work. If you want to use AI to draw insights from meeting statistics, the input must be accurate and comprehensive for the output to be meaningful.

Traditionally, this has been a manual task. To fully leverage the synergies between your CRM and shareholder data, automation is key. This is where AI adds real value.

With AI features, we have made it possible for IR teams to:

- **Import roadshow schedules directly into their CRM from PDFs.** AI removes admin and seamlessly structures meeting data.
- **Meetings in their calendar can automatically be linked** to the CRM, which creates events with the correct investors.
- On the roadmap: **Record meetings and get transcripts** from the app to the CRM and get all conversations easily in one place.

While managing without AI is possible, the efficiency gain is dramatic. It lowers the threshold for logging meeting history, making it easier for IR teams to build a complete and accurate record of interactions.

Over time, this history becomes a powerful resource. It helps strengthen investor relationships, track engagement, and support better-informed strategic decisions.

Meeting Preparation

Successful investor meetings depend on thorough preparation. Before each meeting, IROs need to be up to date on past discussions with an investor and understand how they have recently acted in the market. With hundreds of meeting notes and countless transactions, this is difficult to analyse manually.

AI changes this. One of its greatest strengths is condensing large volumes of text and data into clear, relevant insights.

With AI features, we have made it possible for IR teams to quickly access:

- **Summaries of past comments** from an investor's profile
- **Insights and summaries of investors recent transactions and activity**
- **Analysis of how likely they are to invest** in your company

With these insights at hand, IROs can enter every meeting better prepared and more confident. The result is sharper conversations, stronger relationships, and greater value from every interaction.

AI for Investor Relations: Use Cases and Features

Advising and Reporting to Management

Advising and reporting to management are core responsibilities for an IRO. This includes providing insights into how the market perceives the company, which themes investors are focused on, and how peers are performing. But this information is scattered across earnings reports, analyst estimates, investor interactions, and market news, making it time-consuming and complex to gather and condense into a clear message.

AI makes this process far more efficient. With AI features, we have made it possible for IR teams to quickly access:

- **Summaries of peer earnings, transcripts and analyst reports**
- **Overviews of market expectations and estimate trends**
- **Summaries of key themes and questions raised in past investor interactions**
- **Concise briefings ahead of roadshows or strategic meetings**

With this material, IROs can advise and report to management with greater clarity, speed, and confidence.

Investor Targeting and Intelligence

Shareholder data holds enormous potential, but the sheer volume makes it difficult to know where to focus. Historical transactions of portfolios, and more current market activity contain signals that can guide targeting, yet manually analysing them is overwhelming and slow.

This is where AI powered by machine learning comes in. With extensive data, history, and dedicated training, AI becomes a powerful tool to predict future movements and identify which investors are most likely to invest in your company. With AI features, we have made it possible for IR teams to quickly access:

Investor Targeting with AI

- **Recommendations of the top portfolios most likely to buy.**
Presented both for which manager and the actual fund, based on patterns in holdings, transactions, and history for peers.

AI Targeting Insight

When looking at a manager or sub-fund portfolio in our IR platform Monitor, users can instantly view:

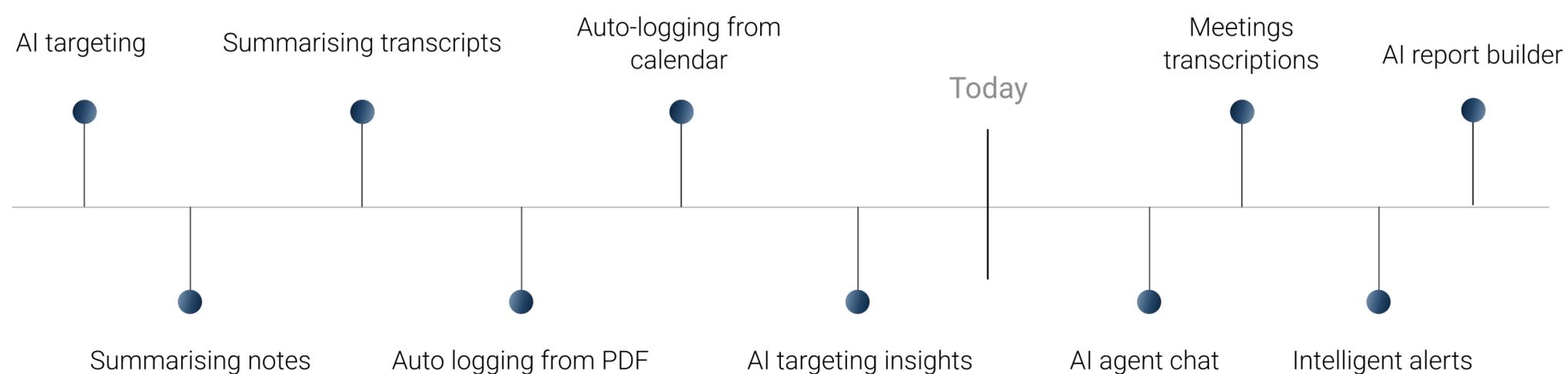
- **Fit scores (1-10)** showing how relevant an investor is to your company.
- **Recommendations to meet** (Yes or No)
- **Estimates of potential maximum investment size** based on sector, list, and peer holdings
- **Breakdowns of key portfolio data** to support prioritisation decisions

With these insights, IROs can more quickly understand which investors to meet and what kind of expectations they can have on a possible investment.

Summary - Features, use-cases and value

Feature	Use case	Value
Auto-logging meetings from calendar	Task automation/meeting preparation	Spend less time on admin, keep track of all interactions
Auto-logging meetings from Roadshow PDFs	Task automation/meeting preparation	Spend less time on admin, keep track of all interactions
Summarising notes	Meeting prep/advising management	Come prepared for more efficient and impactful meetings
Summarising transcripts	Advising management/peer analytics	More impactful research in less time
AI targeting	Shareholder intelligence	Enhanced precision, understanding potential investors
Targeting insights	Shareholder intelligence	Enhanced precision and relevance analytics
AI Agent Chat	All above, but dependent on good data set to deliver valuable output	

Our AI Roadmap



Final words

AI is already proving to be an incredibly valuable tool for IR teams, not only by automating time-consuming tasks but also by delivering instant insights that would otherwise be difficult, or even impossible, to attain.

The use cases we have highlighted, such as logging meeting data, summarising historical investor interactions, and generating investor targeting insights, **show that AI goes far beyond the general research summarisation and text generation many IROs currently are using it for.**

To truly unlock this potential, IROs must also understand that insights from AI depend on the quality of the underlying data. **The greatest value emerges when AI is paired with best-in-class shareholder and CRM data:** an accurate and up-to-date share register, comprehensive peer datasets, and detailed metadata within an investor CRM. With this foundation, AI becomes much more than a time-saver. It transforms into a decision-support engine, providing IROs with timely, data-driven insights that strengthen strategy and execution.

AI can be applied in many different ways, and we have only just begun to tap into that potential in our products. Some of our AI features work quietly in the background, while others are activated through specific tools and functions. This autumn, we are taking the next step by launching our AI chat bot in Monitor. This will enable users to ask questions directly about all CRM and shareholder data in the platform, offering a far simpler and more intuitive way to harness AI.

We are excited to see how IROs adopt and use this new feature. At the same time, as we hope we have proven in this White Paper, IR teams will still be able to derive plenty of value through automations and built-in-tools in other ways than a chat-bot.