

AI-powered IR & Strategy Assistant Transforms Capital Market Engagement for a North American O&G Company

Challenge

The IR and Corporate Strategy teams were burdened by a fragmented, manual process — spending countless hours preparing management scripts, aligning messaging with past quarters, anticipating analyst questions, post-earnings sentiment analysis, investor follow-ups, peer tracking and competitive benchmarking — often taking weeks to complete.

The client needed an AI-driven solution to streamline pre- and post-earnings workflows, ensure consistent investor messaging, extract real-time intelligence from company and peer communications, and enable faster, data-backed responses to analysts, investors, and rating agencies.

Approach

- Data Integration & Security:** Deployed a centralized AI platform stitching data from financials, investor documents, and call transcripts from multiple systems directly into a private, secure environment—not accessible via public LLMs
- Domain-Specific Workflows:** Trained and finetuned complex models for pre and post earnings, answering investor and analyst queries, benchmarking peers' financials, and analyzing peers' capital allocation and market sentiments
- Multi-document Intelligence & Memory:** Developed continuity and consistency while cross-referencing across quarters, competitors and documents
- Output Format Customization:** Supporting investor-ready outputs: slide content, memos, briefings—with charts, tables, citations, and tailored formatting for management and board communication

Key Results

60%

Reduction in time spent preparing earnings materials and analyst Q&A

\$500K

Annual operating cost savings across IR and Strategy functions

70%

Faster turnaround for investor query responses

About Straive

As a data analytics and AI operationalization company, we don't just build top-tier data analytics and AI solutions—we integrate them seamlessly into your core workflows. This approach drives enhanced efficiency, improves user experience, and boosts revenue, setting you apart from the competition. Serving a diverse range of industries—including Pharmaceutical & Life Sciences, Logistics, Supply Chain & Manufacturing, Research & Publishing, Information Services, EdTech, Banking & Financial services, and Retail Tech, Entertainment & Media—we have a global client base spanning over 30 countries. Our strategically positioned resource pool operates across seven countries, including the Philippines, India, the United States, Nicaragua, Vietnam, the United Kingdom, and Singapore, where the company is headquartered.