

Programme

Agentic Artificial Intelligence (AI) for Senior Management Reporting and Strategic Analysis

20 October 2026 9:00 am – 5:00 pm
Bangunan AICB, Kuala Lumpur

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ABOUT THE PROGRAMME

Senior management in the capital market and financial services sector are required to make timely business decisions based on information from management reports, market developments, investment analyses, client updates and committee papers. As the volume and complexity of information increase, organisations are exploring ways to streamline reporting, analysis and decision support while maintaining appropriate governance and human oversight.

Agentic AI extends beyond individual prompting by enabling structured AI-assisted workflows for reporting, analysis and decision support. These workflows can support the summarisation, comparison, review and preparation of information, improving the consistency and efficiency of reporting and decision support.

This advanced programme provides a practical framework for applying agentic AI within the capital market. Participants will explore AI-assisted workflows and practical use cases across investment banking, advisory, stockbroking, treasury, asset and wealth management, together with governance and risk controls. The programme also covers the design of a practical pilot blueprint for applying agentic AI to reporting and analysis workflows within the capital market.

LEARNING OBJECTIVES

- Develop AI-assisted workflows for capital market reporting
- Analyse capital market and business issues using agentic AI to support decision making
- Evaluate governance and risk controls for AI-assisted workflows
- Design a pilot blueprint for adopting agentic AI in capital market reporting and analysis

WHO SHOULD ATTEND

- Senior management, business heads, functional heads and board of directors within capital market institutions and financial services organisations including Investment Bankers, Corporate Finance professionals, Debt and Islamic Capital Market professionals, Stockbrokers, Dealers, Treasurers, Corporate Bankers, Asset Managers, Wealth Advisors, Research Analysts, Compliance professionals, Risk Management professionals
- Other capital market practitioners involved in management reporting, business analysis and decision-making

PREREQUISITES

Participants are expected to:

- have practical experience using at least one AI assistant (e.g. ChatGPT, Microsoft Copilot, Google Gemini or Claude)
- be familiar with management reporting, analysis, review, approval and decision-support processes
- be comfortable using standard workplace tools such as Microsoft Office and Microsoft 365
- bring a laptop or suitable work device with internet access and the necessary login credentials
- have access to an organisational, enterprise or paid AI account where available; trainer-led demonstrations will be provided where access is unavailable
- refrain from uploading confidential, client-related, proprietary, unpublished or restricted information into unauthorised AI tools

LEVEL

Advanced

FEE

MIBA Member : **RM2,300.00** per participant

Non-MIBA Member : **RM2,600.00** per participant

**10% discount applies for group registration of 5 or more from the same organisation*

SPEAKERS



Kelvin Ng
Google Certified Educator Level 1&2
Gemini Certified Educator
Microsoft Office 2019/O365 Expert,
Microsoft Certified Educator



Jeffrey Patrick
Trainer, Consultant, &
Game Producer

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Closing Date for Registration : 6 October 2026

Registration will be closed once all the seats are fully booked