

# 41<sup>st</sup> Annual Institutional Investors Conference: March 1 – 4, 2020

**RAYMOND JAMES**

**Monday, March 2, 2020**

	Mediterranean 1 Breakout Session - Cordova 2	Mediterranean 2 Breakout Session - Cordova 3	Palazzo A Breakout Session - Cordova 4	Palazzo B Breakout Session - Cordova 5	Palazzo C Breakout Session - Cordova 6	Palazzo F Breakout Session - Amarante 1	Palazzo G Breakout Session - Amarante 2	Palazzo H Breakout Session - Cordova 1
7:30am-8:00am	Check Point Software Technologies Ltd. (CHKP)	Masco Corporation (MAS)	Everbridge, Inc. (EVBG)	ORBCOMM Inc. (ORBC)	Reserved	STERIS plc (STE)	Investors Real Estate Trust (IRET)	Tenet Healthcare Corporation (THC)
8:05am-8:35am	Sunstone Hotel Investors, Inc. (SHO)	Service Corporation International (SCI)	NIC Inc. (EGOV)	Cboe Global Markets, Inc. (CBOE)	Reserved	Baxter International Inc. (BAX)	Reserved	Franco-Nevada Corporation (FNV)
8:40am-9:10am	Prestige Consumer Healthcare, Inc. (PBH)	CDW Corporation (CDW)	Akamai Technologies, Inc. (AKAM)	Reserved	Renasant Corporation (RNST)	VineBrook Homes Trust, Inc. (Private)	NeoGenomics, Inc. (NEO)	WPX Energy, Inc. (WPX)
9:15am-9:45am	Simon Property Group, Inc. (SPG)	Delta Air Lines, Inc. (DAL)	Reserved	MSCI Inc. (MSCI)	The Allstate Corporation (ALL)	Murphy USA Inc. (MUSA)	Viking Therapeutics, Inc. (VKTX)	TPI Composites, Inc. (TPIC)
9:50am-10:20am	Analog Devices, Inc. (ADI)	FleetCor Technologies, Inc. (FLT)	MAXIMUS, Inc. (MMS)	Reserved	PRA Group, Inc. (PRAA)	Zimmer Biomet Holdings, Inc. (ZBH)	NexPoint Residential Trust, Inc. (NXRT)	Apache Corporation (APA)
10:25am-10:55am	Malibu Boats, Inc. (MBUU)	Raymond James Financial, Inc. (RJF)	Alarm.com Holdings, Inc. (ALRM)	Intercontinental Exchange, Inc. (ICE)	Home BancShares, Inc. (HOMB)	IDEXX Laboratories, Inc. (IDXX)	Park Hotels & Resorts Inc. (PK)	California Resources Corporation (CRC)
11:00am-11:30am	Waste Connections, Inc. (WCN)	Whirlpool Corporation (WHR)	IPG Photonics (IPGP)	Harmonic Inc. (HLIT)	Wintrust Financial Corporation (WTFC)	Bloomin' Brands, Inc. (BLMN)	Rayonier Inc. (RYN)	National-Oilwell Varco, Inc. (NOV)
11:35am-12:05pm	Leggett & Platt, Incorporated (LEG)	Toll Brothers, Inc. (TOL)	Criteo S.A. (CRTO)	S&P Global Inc. (SPGI)	New York Community Bancorp, Inc. (NYCB)	Flexion Therapeutics, Inc. (FLXN)	Azul S.A. (AZUL)	SunPower Corporation (SPWR)
12:10pm-1:30pm	<b>Lunch Buffet   JW Marriott, Coquina Ballroom</b>							
12:10pm-1:00pm	<b>Lunch &amp; Analyst Presentation   Ritz Carlton Ballroom, Salon I-III</b> "Late Cycle Equity Opportunities" Presenter: Tavis McCourt, Institutional Equity Strategist				<b>Lunch &amp; Analyst Presentation   Ritz Carlton Ballroom, Salon IV-VI</b> "The Washington-Wall Street Connection: Understanding the Impact of the 2020 Elections" Presenters: Edward Mills, Washington Policy Analyst & Chris Meekins, Healthcare Policy Analyst			
1:05pm-1:35pm	Masimo Corporation (MASI)	Weyerhaeuser Company (WY)	Cogent Communications Holdings, Inc. (CCOI)	Nasdaq, Inc. (NDAQ)	Independent Bank Group, Inc. (IBTX)	MasterCraft Boat Holdings, Inc. (MCFT)	Red Robin Gourmet Burgers, Inc. (RRGB)	Agnico Eagle Mines Ltd. (AEM)
1:40pm-2:10pm	Spectrum Brands Holdings, Inc. (SPB)	D.R. Horton, Inc. (DHI)	Manhattan Associates, Inc. (MANH)	MarketAxess Holdings Inc. (MKTX)	United Insurance Holdings Corp. (UIHC)	Stericycle, Inc. (SRCL)	G1 Therapeutics, Inc. (GTHX)	GOL Linhas Aereas Inteligentes S.A. (GOL)
2:15pm-2:45pm	Lumentum Holdings Inc. (LITE)	Fidelity National Information Services, Inc. (FIS)	CACI International Inc (CACI)	Owl Rock Capital Corporation (ORCC)	Meta Financial Group, Inc. (CASH)	Zymeworks Inc. (ZYME)	Xenia Hotels & Resorts, Inc. (XHR)	Nabors Industries Ltd. (NBR)
2:50pm-3:20pm	The Scotts Miracle-Gro Company (SMG)	Stanley Black & Decker, Inc. (SWK)	United States Cellular Corporation (USM)	Envestnet, Inc. (ENV)	Pinnacle Financial Partners, Inc. (PNFP)	Health Catalyst, Inc. (HCAT)	CatchMark Timber Trust, Inc. (CTT)	Reserved
3:25pm-3:55pm	Avnet, Inc. (AVT)	Kansas City Southern (KSU)	Reserved	Main Street Capital Corporation (MAIN)	BRP Group, Inc. (BRP)	La-Z-Boy Incorporated (LZB)	ICU Medical, Inc. (ICUI)	Reserved
4:00pm-4:30pm	Sally Beauty Holdings, Inc. (SBH)	Reserved	Cubic Corporation (CUB)	Jones Lang LaSalle Incorporated (JLL)	Reserved	Galapagos NV (GLPG)	Pebblebrook Hotel Trust (PEB)	The Williams Companies, Inc. (WMB)
4:35pm-5:05pm	Copa Holdings, S.A. (CPA)	SBA Communications Corporation (SBAC)	Wabash National Corporation (WNC)	Barings BDC, Inc. (BBDC)	Argo Group International Holdings, Ltd. (ARGO)	Haemonetics Corporation (HAE)	Jernigan Capital, Inc. (JCAP)	Reserved

Participating in 1:1s only: AFL, BDX, MHK, PINE

Subject to change.

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**RAYMOND JAMES**

**Tuesday, March 3, 2020**

	Mediterranean 1 Breakout Session - Cordova 2	Mediterranean 2 Breakout Session - Cordova 3	Palazzo A Breakout Session - Cordova 4	Palazzo B Breakout Session - Cordova 5	Palazzo C Breakout Session - Cordova 6	Palazzo F Breakout Session - Amarante 1	Palazzo G Breakout Session - Amarante 2	Palazzo H Breakout Session - Cordova 1
7:30am-8:00am	Tempur Sealy International, Inc. (TPX)	Monolithic Power Systems, Inc. (MPWR)	Reserved	AssetMark Financial Holdings, Inc. (AMK)	American Equity Investment Life Holding Company (AEL)	MarineMax, Inc. (HZO)	Mesa Air Group, Inc. (MESA)	Itron, Inc. (ITRI)
8:05am-8:35am	W.W. Grainger, Inc. (GWW)	Union Pacific Corporation (UNP)	Reserved	Rapid7, Inc. (RPD)	United Bankshares, Inc. (UBSI)	Reserved	PotlatchDeltic Corporation (PCH)	Matador Resources Company (MTDR)
8:40am-9:10am	Booz Allen Hamilton Holding Corp. (BAH)	Cheesecake Factory Inc. (CAKE)	Reserved	SEI Investments Company (SEIC)	Axos Financial, Inc. (AX)	Arlo Technologies, Inc. (ARLO)	Trupanion, Inc. (TRUP)	Newpark Resources, Inc. (NR)
9:15am-9:45am	Qorvo, Inc. (QRVO)	Brinker International, Inc. (EAT)	OneWater Marine Inc. (ONEW)	Ares Capital Corporation (ARCC)	Reserved	Amedisys, Inc. (AMED)	CareDx, Inc. (CDNA)	Pioneer Natural Resources Company (PXD)
9:50am-10:20am	Heska Corporation (HSKA)	Acushnet Holdings Corp. (GOLF)	Iridium Communications Inc. (IRDM)	Reserved	BOK Financial Corporation (BOKF)	Reserved	M.D.C. Holdings, Inc. (MDC)	Helix Energy Solutions Group, Inc. (HLX)
10:25am-10:55am	J.B. Hunt Transport Services, Inc. (JBHT)	Hyatt Hotels Corporation (H)	Paylocity Holding Corporation (PCTY)	Jack Henry & Associates, Inc. (JKHY)	Willis Towers Watson Public Limited Company (WLTW)	Aaron's, Inc. (AAN)	SkyWest, Inc. (SKYW)	Reserved
11:00am-11:30am	LKQ Corporation (LKQ)	Brunswick Corporation (BC)	nLIGHT, Inc. (LASR)	Switch, Inc. (SWCH)	Bank OZK (OZK)	Ruth's Hospitality Group, Inc. (RUTH)	Insulet Corporation (PODD)	Atlantica Yield plc (AY)
11:35am-12:05pm	Sleep Number Corporation (SNBR)	United Parcel Service, Inc. (UPS)	Arrow Electronics, Inc. (ARW)	Broadridge Financial Solutions, Inc. (BR)	Reserved	Premier, Inc. (PINC)	Quidel Corporation (QDEL)	Construction Partners, Inc. (ROAD)
12:10pm-1:30pm	<b>Lunch Buffet   JW Marriott, Coquina Ballroom</b>							
12:10pm-1:00pm	<b>Lunch &amp; Panel Discussion   Ritz Carlton Ballroom, Salon I-III</b> <b>"ESG: Corporate and Investor Perspectives"</b> Moderator: Tavis McCourt, Institutional Equity Strategist Panelists: Ross Campbell, Director of Responsible Investing, Barrow, Hanley, Mewhinney & Strauss, LLC; Katherine Collins, Head of Sustainable Investing, Putnam; Kurt Kuehn, Former CFO, UPS and Sector Chair for Transportation and Infrastructure, SASB; Gabe Nacht, CFO, Switch, Inc.							
1:05pm-1:35pm	Reserved	YETI Holdings, Inc. (YETI)	Reserved	SiTime Corporation (SITM)	Verisk Analytics, Inc. (VRSK)	Farmland Partners Inc. (FPI)	MSC Industrial Direct Co., Inc. (MSM)	Reserved
1:40pm-2:10pm	Ryman Hospitality Properties, Inc. (RHP)	American Tower Corporation (AMT)	Citrix Systems, Inc. (CTXS)	Revolve Group, Inc. (RVLV)	Synovus Financial Corp. (SNV)	Intuitive Surgical, Inc. (ISRG)	Allegiant Travel Company (ALGT)	Occidental Petroleum Corporation (OXY)
2:15pm-2:45pm	Polaris Inc. (PII)	Digital Realty Trust, Inc. (DLR)	FLIR Systems, Inc. (FLIR)	CME Group Inc. (CME)	Zions Bancorporation (ZION)	Reserved	Reserved	Reserved
2:50pm-3:20pm	Summit Hotel Properties, Inc. (INN)	Republic Services, Inc. (RSG)	Jumia Technologies AG (JMIA)	MiX Telematics Limited (MIXT)	Kemper Corporation (KMPR)	HCA Healthcare, Inc. (HCA)	Dine Brands Global, Inc. (DIN)	Reserved
3:25pm-3:55pm	Reserved	Teleflex Incorporated (TFX)	NETGEAR, Inc. (NTGR)	Brown & Brown, Inc. (BRO)	Cadence Bancorporation (CADE)	Applied Optoelectronics, Inc. (AAOI)	MRC Global Inc. (MRC)	Oil States International, Inc. (OIS)
4:00pm-4:30pm	Spirit Airlines, Inc. (SAVE)	Reserved	Limelight Networks, Inc. (LLNW)	Reserved	TCF Financial Corporation (TCF)	Phreesia, Inc. (PHR)	WESCO International, Inc. (WCC)	FirstService Corporation (FSV)
4:35pm-5:05pm	US Ecology, Inc. (ECOL)	Bottomline Technologies (EPAY)	Fortress Transportation & Infrastructure Inv. LLC (FTAI)	SS&C Technologies Holdings, Inc. (SSNC)	Community Bank System, Inc. (CBU)	Acadia Healthcare Company, Inc. (ACHC)	Reserved	Tecnoglass Inc. (TGLS)

Participating in 1:1s only: ABMD, ANGI, BBY, BLKB, CGNX, CRM, EVTC, EXP, FTDR, LHX, LSPD, MAR, MDT, OAS, TELL, TFC, TSLX, WEX

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Wednesday, March 4, 2020

	Mediterranean 1 Breakout Session - Cordova 2	Mediterranean 2 Breakout Session - Cordova 3	Palazzo A Breakout Session - Cordova 4	Palazzo B Breakout Session - Cordova 5	Palazzo C Breakout Session - Cordova 6	Palazzo F Breakout Session - Amarante 1	Palazzo G Breakout Session - Amarante 2	Palazzo H Breakout Session - Cordova 1
7:30am-8:00am	Casella Waste Systems, Inc. (CWST)	Reserved	BlackRock TCP Capital Corp. (TCPC)	Moody's Corporation (MCO)	Reserved	Reserved	Reserved	TETRA Technologies, Inc. (TTI)
8:05am-8:35am	Reserved	AutoZone, Inc. (AZO)	Plexus Corp. (PLXS)	EverQuote, Inc. (EVER)	Seacoast Banking Corporation of Florida (SBCF)	OraSure Technologies, Inc. (OSUR)	Intact Financial Corporation (IFC.T)	Chart Industries, Inc. (GTLS)
8:40am-9:10am	Clean Harbors, Inc. (CLH)	Reserved	CyrusOne Inc. (CONE)	Reserved	HealthEquity, Inc. (HQY)	Reserved	National Retail Properties, Inc. (NNN)	Delek US Holdings, Inc. (DK)
9:15am-9:45am	Beacon Roofing Supply, Inc. (BECN)	Hilton Worldwide Holdings Inc. (HLT)	Reserved	CarGurus, Inc. (CARG)	Reserved	Mirum Pharmaceuticals, Inc. (MIRM)	Covetrus, Inc. (CVET)	Bloom Energy Corporation (BE)
9:50am-10:20am	Reserved	The Home Depot, Inc. (HD)	iRobot Corporation (IRBT)	Reserved	Flagstar Bancorp, Inc. (FBC)	Avanos Medical, Inc. (AVNS)	DIRTT Environmental Solutions Ltd. (DRTT)	Evoqua Water Technologies Corp. (AQUA)
10:25am-10:55am	Reserved	Walmart Inc. (WMT)	Shenandoah Telecommunications Company (SHEN)	Cambium Networks Corporation (CMBM)	Origin Bancorp, Inc. (OBNK)	Fastenal Company (FAST)	Reserved	Reserved
11:00am-11:30am	Saia, Inc. (SAIA)	Genuine Parts Company (GPC)	Cerence, Inc. (CRNC)	Reserved	Reserved	Reserved	DaVita Inc. (DVA)	Hess Corporation (HES)
11:35am-12:05pm	<b>Panel Session: "Taking the Temperature of D.C. Health Policy: 2020 and Beyond"</b> Moderator: Chris Meekins, Healthcare Policy Analyst; Panelists: John Ransom, Senior Healthcare Analyst and Rachel Stephan, Healthcare Sales Specialist	Reserved	QTS Realty Trust, Inc. (QTS)	ViaSat, Inc. (VSAT)	Reserved	NOW Inc. (DNOW)	City Office REIT, Inc. (CIO)	Advanced Energy Industries, Inc. (AEIS)
12:10pm-12:40pm		Reserved	ScanSource, Inc. (SCSC)	Everi Holdings Inc. (EVRI)	FedNat Holding Company (FNHC)	Reserved	Reserved	Ameresco, Inc. (AMRC)
12:10pm-2:00pm	<b>Lunch Buffet   JW Marriott, Coquina Ballroom</b>							

Participating in 1:1s only: CBRE, CVX, REG, TGT

Subject to change.