

# Agenda

## Global Technology Conference

Ritz Carlton, San Francisco, 600 Stockton Street

Monday, November 14, 2016



| Meeting Room | Salon II   | Salon I   | Salon III  | Salon V   |
|--------------|--|---|--|---|
| 7:30 a.m.    | Registration and continental breakfast   |   |  |   |
| 8:15 a.m.    | <b>Welcome remarks</b><br><b>UBS</b> , Mike Pasquale, Managing Director and Co-Head, Americas Equities Distribution  |   |  |   |
| 8:30 a.m.    | <b>Keynote presentation</b><br><b>Palantir Technologies</b><br>Eric Rosenblum, <i>Product Lead</i>   |   |  |   |
| 9:15 a.m.    | <b>The Experts Debate Apple</b><br><b>Moderator: UBS</b> , Steven Milunovich, <i>Managing Director, IT Hardware Analyst</i><br><b>Fortune Magazine</b> , Adam Lashinsky, <i>Assistant Managing Editor</i><br><b>Clayton Christensen Institute</b> , Horace Dediu, <i>Director of the Fellows Program</i><br><b>Bloomberg</b> , Mark Gurman | <b>The Future of Mobility: Autonomous Cars</b><br><b>Moderator: UBS</b> , Eric Sheridan, <i>Managing Director, Internet Analyst</i> and Colin Langan, <i>Director, Automotive Analyst</i><br><b>Ford Motor Company</b> , Chris Brewer, <i>Autonomous Vehicle Program Manager</i><br><b>Stanford University</b> , Marco Pavone, <i>Director of the Autonomous Systems Library</i><br>Annie Lien, <i>Industry Expert &amp; Advisor</i>                      | <b>Guidewire Software</b><br>Richard Hart, <i>Chief Financial Officer</i>  | <b>Zenefits</b><br>David Sacks, <i>Chief Executive Officer</i>  |
| 10:00 a.m.   | <b>Red Hat Inc</b><br>Mike Evans, <i>VP, Business Development and Cloud Strategy</i>   | <b>SAP</b><br>Mike Ettling, <i>President, SAP SuccessFactors</i>  | <b>Texas Instruments</b><br>Dave Pahl, <i>Vice President &amp; Head of Investor Relations</i>  | <b>Proofpoint Inc</b><br>Manish Sarin, <i>EVP, Corporate Planning &amp; Development</i>                             |
| 10:45 a.m.   | <b>Keynote presentation</b><br><b>eBay Inc</b><br>Scott Schenkel, <i>SVP &amp; Chief Financial Officer</i>   |   |  |   |
| 11:30 a.m.   | Boxed lunch available  |   |  |   |
| 11:45 a.m.   | <b>Keynote presentation - Silicon Valley Scoop with Sarah Lacy</b><br><b>Pando</b><br>Sarah Lacy, <i>Founder, Editor-in-Chief and CEO</i>  |   |  | <b>New Relic</b><br>Mark Sachleben, <i>Chief Financial Officer</i>  |
| 12:30 p.m.   | <b>SoFi</b><br>Andrea Blankmeyer, <i>VP, Finance</i>   | <b>Tableau Software</b><br>Tom Walker, <i>Chief Financial Officer</i>   | <b>Cornerstone onDemand</b><br>Adam Miller, <i>Chief Executive Officer</i><br>Brian Swartz, <i>Chief Financial Officer</i>   | <b>Ultimate Software</b><br>Mitch Dauerman, <i>EVP, Chief Financial Officer &amp; Investor Relations</i>            |
| 1:15 p.m.    | <b>FireEye</b><br>Mike Berry, <i>CFO &amp; COO</i>   | <b>IPsoft</b><br>Jonathan Crane, <i>Chief Commercial Officer</i>  | <b>The Future of Mobility: Connected Cars</b><br><b>Moderator: UBS</b> , Eric Sheridan, <i>Managing Director, Internet Analyst</i> and Colin Langan, <i>Director, Automotive Analyst</i><br><b>Airbiquity</b> , Kamyar Moinzadeh, <i>CEO</i><br><b>Movimento</b> , Mahbulul Alam, <i>CTO</i><br><b>Stanford University Center for Design Research</b> , Wendy Ju, <i>Executive Director, Director, Interaction Design Research</i> | <b>Jabil Circuit</b><br>Michael Loparco, <i>EVP, CEO, Engineered Solutions Group</i>                                |
| 2:00 p.m.    | <b>Flex</b><br>Paul Humphries, <i>President, HRS</i><br>Kevin Kessel, <i>VP, Investor Relations</i>  | <b>Twilio Inc.</b><br>Jeff Lawson, <i>Co-Founder &amp; CEO</i><br>Lee Kirkpatrick, <i>Chief Financial Officer</i>   | <b>Paylocity Holding Corp</b><br>Steve Beauchamp, <i>President &amp; CEO</i><br>Peter McGrail, <i>Chief Financial Officer</i>  | <b>POPSUGAR</b><br>Brian Sugar, <i>Founder &amp; CEO</i>  |
| 2:45 p.m.    | <b>Keynote presentation</b><br><b>GE</b><br>William Ruh, <i>CEO, GE Digital and CDO, General Electric</i>  |   |  |   |
| 3:30 p.m.    | <b>Arista Networks Inc</b><br>Ita Brennan, <i>Chief Financial Officer</i>  | <b>Cybersecurity - What's Next?</b><br><b>Moderator: UBS</b> , Brent Thill, <i>Managing Director, Software Analyst</i><br><b>Bess Ventures &amp; Advisory</b> , Lane Bess, <i>Principal &amp; Advisor, Former COO Zscaler, former CEO PANW</i><br><b>Bromium</b> , Simon Crosby, <i>CTO</i><br><b>SailPoint Technologies, Inc.</b> , Cam McMartin, <i>CFO</i><br><b>Illumio</b> , Andrew Rubin, <i>CEO</i><br><b>Netskope</b> , Jamie Barnett, <i>CMO</i> |  | <b>HubSpot Inc.</b><br>John Kinzer, <i>Chief Financial Officer</i>  |
| 4:15 p.m.    | <b>OpenX</b><br>Tim Cadogan, <i>Chief Executive Officer</i>  | <b>Zendesk Inc.</b><br>Tom Keiser, <i>Chief Information Officer</i>   | <b>Sophos Group</b><br>Kris Hagerman, <i>Chief Executive Officer</i><br>Nick Bray, <i>Chief Financial Officer</i>  | <b>Oclaro Inc.</b><br>Greg Dougherty, <i>Chief Executive Officer</i><br>Pete Mangan, <i>Chief Financial Officer</i> |
| 5:00 p.m.    | Business sessions conclude   |   |  |   |

To access the audio webcast: Go to [www.ibb.ubs.com/Conferences](http://www.ibb.ubs.com/Conferences). Look for the webcast link to the right of Global Technology Conference. Please note: Only companies who have chosen to webcast will be listed.

When you receive UBS Access Invites (including, but not limited to, invitations to participate in UBS corporate access events, UBS analyst marketing events, UBS conferences, UBS field trips, UBS expert events, and the like) or are otherwise informed of the events et al. to which they relate, you agree not to copy, revise, amend, create a derivative work of, or in any way commercially exploit the UBS Access Invites. You further agree not to pass along, disclose or forward the UBS Access Invites, or information regarding the events et al. to which they relate, to any third party for any purpose, without the prior written consent of UBS. The foregoing restrictions on use apply to all UBS Access Invites that you may receive, irrespective of the means through which they are communicated to you.

© UBS 2016. All rights reserved. All pictures or images presented herein, are for illustrative purposes only. No relationship, association, sponsorship, or endorsement is suggested or implied between UBS and any landmarks or properties, or with their respective owners, organizations, management, sponsors, investors or patrons.



# Agenda

## Global Technology Conference

Ritz Carlton, San Francisco, 600 Stockton Street  
Tuesday, November 15, 2016



| Meeting Room          | Salon II   | Salon I   | Salon III  | Salon V  |
|-----------------------|--|---|--|--|
| 7:00 a.m.             | Registration and continental breakfast   |   |  |  |
| 8:00 a.m.             | <b>Keynote presentation</b><br><b>Electronic Arts</b><br>Blake Jorgensen, <i>Chief Financial Officer</i>   |   |  |  |
| 8:45 a.m.             | <b>Keynote presentation</b><br><b>ServiceNow</b><br>Frank Sloatman, <i>Chief Executive Officer</i>   |   |  |  |
| 9:30 a.m.             | <b>Panel : What's New in Digital Advertising?</b><br><b>Moderator: UBS</b> , Eric Sheridan, <i>Managing Director, Internet Analyst</i><br><b>InMobi</b> , Varsha Udayabhanu, <i>Head of Corporate Development &amp; IR</i><br><b>Boost Media</b> , Suzie Kronberger, <i>VP of Sales Operations, Marketing &amp; Sales Development</i><br><b>AdRoll</b> , Peter Krivkovich, <i>CFO &amp; COO</i><br><b>Emarsys AG</b> , Ohad Hecht, <i>CEO</i>            | <b>Check Point Software Technologies</b><br>Tal Payne, <i>CFO &amp; COO</i><br>Kip Meintzer, <i>Global Head, Investor Relations</i>   | <b>NICE Ltd</b><br>Marty Cohen, <i>VP, Investor Relations</i>  | <b>ams AG</b><br>Alexander Everke, <i>Chief Executive Officer</i>  |
| 10:15 a.m.            | <b>Digital Asia - Driving Digital Marketing and Platform Innovation in Asia</b><br><b>Moderator: UBS</b> , Eric Sheridan, <i>Managing Director, Internet Analyst</i><br><b>Micromax</b> , Kumar Shah, <i>Global Head of M&amp;A and Strategy</i><br><b>Yoyi Digital</b> , Roy Zhou, <i>Chief Executive Officer</i>   | <b>Universal Display</b><br>Sidney Rosenblatt, <i>EVP &amp; Chief Financial Officer</i>   | <b>CyberArk Software Ltd.</b><br>Josh Siegel, <i>Chief Financial Officer</i><br>Erica Smith, <i>VP, Investor Relations</i>   | <b>Hortonworks</b><br>Scott Landers, <i>Chief Financial Officer</i><br>Brian Marshall, <i>VP, Corporate Development</i>  |
| 11:00 a.m.            | <b>Akamai Technologies</b><br>Tom Barth, <i>Head of Investor Relations</i>   | <b>Fortinet</b><br>Drew Del Matto, <i>Chief Financial Officer</i><br>Michelle Spolver, <i>Chief Communications Officer</i>  | <b>Paycom Software Inc.</b><br>Chad Richison, <i>Chief Executive Officer</i><br>Craig Boelte, <i>Chief Financial Officer</i> | <b>Monotype Imaging Holdings, Inc.</b><br>Scott Landers, <i>President &amp; CEO</i><br>Chris Brooks, <i>Vice President, Finance and Investor Relations</i>   |
| 11:45 a.m.            | Boxed lunch available  |   |  |  |
| 12:00 p.m.            | <b>Keynote presentation</b><br><b>VMWare</b><br>Zane Rowe, <i>EVP &amp; Chief Financial Officer</i>  |   |  |  |
| 12:45 p.m.            | <b>Keynote presentation</b><br><b>IBM</b><br>Tom Rosamilia, <i>Senior Vice President, IBM Systems</i>  |   |  |  |
| 1:30 p.m.             | <b>Symantec</b><br>Gregory Clark, <i>Chief Executive Officer</i><br>Nick Noviello, <i>Chief Financial Officer</i>  | <b>DealerSocket</b><br>Chad Martin, <i>Chief Financial Officer</i>  | <b>Wix</b><br>Joe Pollaro, <i>General Manager, US</i>  | <b>Who Wins, Who Loses in Infrastructure</b><br><b>Moderator: UBS</b> , Steven Milunovich, <i>Managing Director, IT Hardware Analyst</i><br><b>Dell'Oro</b> , Sameh Boujelbene, <i>Director, Controller &amp; Adapter and Server Market Research</i><br><b>Dell'Oro</b> , Chris DePuy, <i>Vice President, Carrier IP Telephony, Storage Systems, Wireless LAN &amp; Wireless Packet Core Market Research</i><br><b>Dell'Oro</b> , Alan Weckel, <i>Vice President, Ethernet Switch, Data Center SDN, and Enterprise Telephony Market Research</i> |
| 2:15 p.m.             | <b>Keynote presentation</b><br><b>Visa</b><br>Vasant Prabhu, <i>EVP and Chief Financial Officer</i>  |   |  |  |
| 3:00 p.m.             | <b>Emerging Private Company Panel - Part I</b><br><b>Moderator: UBS</b> , Brent Thill, <i>Managing Director, Software Analyst</i><br><b>MarkLogic</b> , Gary Bloom, <i>President &amp; CEO</i><br><b>K2</b> , David Marcus, <i>SVP, Strategy &amp; Business Alliances</i><br><b>DoorDash</b> , Mike Dinsdale, <i>Chief Financial Officer</i><br><b>Cloudera</b> , Kevin Cook, <i>VP Investor Relations, Treasury and Corporate Finance</i>               | <b>Carbonite Inc.</b><br>Anthony Folger, <i>Chief Financial Officer</i>   |  | <b>Acacia Communications</b><br>Raj Shanmugaraj, <i>President &amp; CEO</i><br>John Gavin, <i>Chief Financial Officer</i>  |
| 3:45 p.m.             | <b>Emerging Private Company Panel -Part II</b><br><b>Moderator: UBS</b> , Brent Thill, <i>Managing Director, Software Analyst</i><br><b>Marin Software</b> , Chris Lien, <i>Founder Chairman &amp; CEO</i><br><b>Financialforce.com</b> , John Bonney, <i>CFO</i><br><b>Infusionsoft</b> , Curtis Smith, <i>CFO</i>  | <b>All Things E-Commerce</b><br><b>Moderator: UBS</b> , Eric Sheridan, <i>Managing Director, Internet Analyst</i><br><b>Omni Channel</b> , Brian Bradley, <i>President</i><br><b>Teespring</b> , Robert Chatwani, <i>Advisor and Former CMO, eBay</i> |  | <b>Talend</b><br>Thomas Tuchscherer, <i>Chief Financial Officer</i>  |
| 4:30 p.m.             | <b>Watson - Come Here!</b><br><b>Moderator: UBS</b> , John Roy, <i>Director, IT Hardware Analyst</i><br><b>Arago GmbH</b> , Hans-Christian Boos, <i>CEO</i><br><b>Kore</b> , Bruce Wilcox, <i>Director of Natural Language Strategy</i><br><b>msg.ai</b> - Puneet Mehta, <i>Founder &amp; CEO</i><br><b>Digital Reasoning</b> , Matthew Russell, <i>CTO</i><br><b>Narrative Science</b> , Larry Birnbaum, <i>Co-Founder and Chief Scientific Officer</i> | <b>Lumentum</b><br>Aaron Tachibana, <i>Chief Financial Officer</i><br>Chris Coldren, <i>VP, Strategy and Corporate Development</i>  |  | <b>MINDBODY Inc.</b><br>Rick Stollmeyer, <i>Chief Executive Officer</i><br>Brett White, <i>Chief Financial Officer</i>   |
| 5:15 p.m. - 7:00 p.m. | <b>Networking reception - Terrace Courtyard</b>  |   |  |  |

To access the audio webcast: Go to [www.ubb.ubs.com/Conferences](http://www.ubb.ubs.com/Conferences). Look for the webcast link to the right of Global Technology Conference. Please note: Only companies who have chosen to webcast will be listed.

# Agenda

## Global Technology Conference

Ritz Carlton, San Francisco, 600 Stockton Street

Wednesday, November 16, 2016



| Meeting Room | Salon II  | Salon I  | Salon III  | Salon V  |
|--------------|---|--|--|--|
| 7:00 a.m.    | Registration and continental breakfast  |  |  |  |
| 8:00 a.m.    | <b>Keynote</b><br><b>Adobe Systems</b><br>Mark Garrett, <i>EVP &amp; Chief Financial Officer</i><br>Mike Saviage, <i>VP, Investor Relations</i>   |  |  |  |
| 8:45 a.m.    | <b>Cloud Services: The Enablers of Public Cloud Adoption</b><br><b>Moderator: UBS</b> , Eric Sheridan, <i>Managing Director, Internet Analyst</i> and Steven Milunovich, <i>Managing Director, IT Hardware Analyst</i><br><b>Cloud Technology Partners</b> , John Treadway, <i>Senior Vice President</i><br><b>2nd Watch</b> , Jeff Aden, <i>Founder &amp; EVP, Marketing &amp; Business Development</i><br><b>MosaixSoft</b> , Simone Brunozi, <i>VP &amp; CTO</i>   | <b>Tyler Technologies Inc.</b><br>Brian Miller, <i>EVP &amp; Chief Financial Officer</i>           | <b>ASML Holding NV</b><br>Skip Miller, <i>Director, Investor Relations</i><br>Pete Convertito, <i>Manager, Investor Relations, North America</i> | <b>CrowdStrike</b><br>Burt Podbere, <i>Chief Financial Officer</i>   |
| 9:30 a.m.    | <b>The Outlook for Virtual &amp; Augmented Reality</b><br><b>Moderator: UBS</b> , Eric Sheridan, <i>Managing Director, Internet Analyst</i><br><b>NextVR</b> , Helen Situ, <i>Virtual Reality Evangelist</i><br><b>Penrose</b> , Eugene Chung, <i>Founder &amp; CEO</i><br><b>Unity</b> , Tony Parisi, <i>Head of AR and VR Strategy</i>  | <b>Accenture</b><br>Bob Sell, <i>Group Chief Executive, Communications, Media &amp; Technology</i> | <b>Atlassian Corp plc</b><br>Murray Demo, <i>Chief Financial Officer</i>   |  |
| 10:15 a.m.   | <b>Keynote presentation</b><br><b>UBS IT Expert Panel - Tech Trends &amp; Spends for 2017</b><br><b>Moderator: UBS</b> , Brent Thill, <i>Managing Director, Software Analyst</i><br><b>UBS</b> , Clyde Dawson, <i>IT Service Delivery</i><br><b>UBS</b> , Jonathan Grantham, <i>IT Services and Sourcing Strategy</i><br><b>UBS</b> , Stefan Marzohl, <i>Security CTO</i><br><b>UBS</b> , Stephan Murer, <i>Group CTO</i><br><b>UBS</b> , Scott Ross, <i>Head of Research &amp; Development</i><br><b>UBS</b> , Roger Sueess, <i>Infrastructure Services Architecture CTO</i> |  |  |  |
| 11:00 a.m.   | <b>Keynote presentation</b><br><b>Microsoft Corp</b><br>Rajesh Jha, <i>Executive Vice President, Office Product Group</i>   |  |  |  |
| 11:45 a.m.   | Boxed lunch available   |  |  |  |
| 12:00 p.m.   | <b>Venture Capital Panel</b><br><b>Moderator: UBS</b> , Brent Thill, <i>Managing Director, Software Analyst</i><br><b>Accel Partners</b> , Jake Flomenberg, <i>Partner</i><br><b>Hummer Winblad Venture Partners</b> , Lars Leckie, <i>Managing Director</i><br><b>Sand Hill East, LLP</b> , Andy Brown, <i>Chief Executive Officer</i><br><b>Sequoia Capital</b> , Carl Eschenbach, <i>Partner</i>   |  |  | <b>Luxoft Holding Inc.</b><br>Anders Brown, <i>Managing Director, Global Centers of Expertise</i><br>Alina Plaia, <i>VP, Global Communications &amp; IRO</i> |
| 12:45 p.m.   | <b>Keynote presentation - Mega Trends in Tech</b><br><b>Andy Brown</b> , <i>Connector, Director, Innovator, Investor and CEO</i>  |  |  |  |
| 1:30 p.m.    | Business sessions conclude / one-on-one meetings continue   |  |  |  |
| 5:00 p.m.    | Conference concludes  |  |  |  |

To access the audio webcast: Go to [www.ubb.ubs.com/Conferences](http://www.ubb.ubs.com/Conferences). Look for the webcast link to the right of Global Technology Conference. Please note: Only companies who have chosen to webcast will be listed.

When you receive UBS Access Invites (including, but not limited to, invitations to participate in UBS corporate access events, UBS analyst marketing events, UBS conferences, UBS field trips, UBS expert events, and the like) or are otherwise informed of the events et al. to which they relate, you agree not to copy, revise, amend, create a derivative work of, or in any way commercially exploit the UBS Access Invites. You further agree not to pass along, disclose or forward the UBS Access Invites, or information regarding the events et al. to which they relate, to any third party for any purpose, without the prior written consent of UBS. The foregoing restrictions on use apply to all UBS Access Invites that you may receive, irrespective of the means through which they are communicated to you.

© UBS 2016. All rights reserved. All pictures or images presented herein, are for illustrative purposes only. No relationship, association, sponsorship, or endorsement is suggested or implied between UBS and any landmarks or properties, or with their respective owners, organizations, management, sponsors, investors or patrons.



# Agenda

## Global Technology Conference

Ritz Carlton, San Francisco, 600 Stockton Street

One-on-one & group meetings only



| Company Name                            |
|---|
| Activision Blizzard                     |
| Advanced Semiconductor Engineering Inc. |
| Amdocs                                  |
| Anaplan                                 |
| Aria Systems                            |
| Benefit Focus                           |
| Calix                                   |
| Cherwell Software                       |
| Cognizant Technology Solutions          |
| Cyphort                                 |
| Euronet Worldwide                       |
| Extreme Networks                        |
| Intel Corporation                       |
| Logitech International SA               |
| Maxim Integrated Products               |

| Company Name              |
|---------------------------|
| Mimecast Ltd              |
| Photronics                |
| Silicon Motion Technology |
| Social Capital            |
| Smule                     |
| Sony                      |
| Teradyne Inc.             |
| The RealReal              |
| Tujia.com                 |
| Twitter Inc.              |
| Veeco Instruments         |
| WhiteHat Security Inc.    |
| Xilinx                    |
| Zynga                     |

To access the audio webcast: Go to [www.ibb.ubs.com/Conferences](http://www.ibb.ubs.com/Conferences). Look for the webcast link to the right of Global Technology Conference. Please note: Only companies who have chosen to webcast will be listed.

When you receive UBS Access Invites (including, but not limited to, invitations to participate in UBS corporate access events, UBS analyst marketing events, UBS conferences, UBS field trips, UBS expert events, and the like) or are otherwise informed of the events et al. to which they relate, you agree not to copy, revise, amend, create a derivative work of, or in any way commercially exploit the UBS Access Invites. You further agree not to pass along, disclose or forward the UBS Access Invites, or information regarding the events et al. to which they relate, to any third party for any purpose, without the prior written consent of UBS. The foregoing restrictions on use apply to all UBS Access Invites that you may receive, irrespective of the means through which they are communicated to you.

© UBS 2015. All rights reserved. All pictures or images presented herein, are for illustrative purposes only. No relationship, association, sponsorship, or endorsement is suggested or implied between UBS and any landmarks or properties, or with their respective owners, organizations, management, sponsors, investors or patrons.