







Agenda

Global Industrials & Transportation Conference

Lotte New York Palace Hotel, New York City

Wednesday, June 5

7:30 a.m.	Registration and continental breakfast, 2nd floor	
	Room	Villard Ballroom
7:55 a.m.	Welcome from Charles Otton, <i>Global Co-Head, Global Industrials Group, UBS</i>	
8:00 a.m.	Union Pacific Corp F Rob Knight, <i>Executive Vice President & CFO</i>	Waste Connections, Inc F Mary Anne Whitney, <i>Senior Vice President & CFO</i>
8:45 a.m.	Norfolk Southern Corp F James A. Squires, <i>Chairman, President & CEO</i>	Republic Services Inc F Chuck Serianni, <i>Executive Vice President & CFO</i> Nicole Giandinoto, <i>Senior Vice President, IR</i>
9:30 a.m.	Woodward F Bob Weber, <i>Vice Chairman & CFO</i>	Covanta Holding Corp F Brad Helgeson, <i>Executive Vice President & CFO</i>
10:15 a.m.	Hexcel Corp F Nick Stanage, <i>Chief Executive Officer</i>	Tenneco Inc F Roger Wood, <i>Co-Chief Executive Officer</i>
11:00 a.m.	General Motors Company Mark Reuss, <i>President</i>	Schneider National, Inc F Mark Rourke, <i>Chief Executive Officer</i> Steve Bruffett, <i>Chief Financial Officer</i>
11:45 a.m.	Lunch available on the 2nd floor	
11:50 a.m.	UBS Evidence Lab Ben Nunnery, <i>Engagement Manager</i>	
	UBS Equity Research presents Industrials Nowcasting Ajit Agrawal, <i>Strategist, Managing Director</i>	
12:00 p.m.	Luncheon Keynote Boeing Corp F Greg Smith, <i>Chief Financial Officer, EVP, Enterprise Performance & Strategy</i>	
12:45 p.m.	Bombardier, Inc F Patrick Ghoche, <i>Vice President, IR</i>	SPX Corp Gene Lowe, <i>Chief Executive Officer</i>
1:30 p.m.	How low can EV battery costs go? P  Dr. Prabhakar Patil, <i>Independent Advisor, LG Chem Power Inc</i> Sam Jaffe, <i>Managing Director, Cairn Energy Research Advisors</i>	Watsco Barry Logan, <i>Senior Vice President</i>
2:15 p.m.	Will the future truck be electric? P  Jim Castelaz, <i>Founder and CTO, Motiv</i> Dr. Prabhakar Patil, <i>Independent Advisor, LG Chem Power Inc</i> Venkat Viswanathan, <i>Professor Mechanical Engineering, Carnegie Mellon University</i>	TFI International David Saperstein, <i>Chief Financial Officer</i>
3:00 p.m.	Will the future car be electric? P  Sam Abuelsamid, <i>Principal Analyst, Navigant Research</i> David Keith, <i>Assistant Professor, MIT Sloan School of Management</i> Roger Wood, <i>Co-Chief Executive Officer, Tenneco, Inc.</i>	AquaVenture Holdings Limited Tony Ibarguen, <i>Chief Executive Officer</i>
3:45 p.m.	Will driverless ride on demand disrupt car ownership? P  Anna Widera, <i>Founder & Principal, Calafia Advisors</i> Philipp Kampshoff, <i>Partner, McKinsey & Company</i>	Casella Waste Systems, Inc F John Casella, <i>Chairman & CEO</i> Ned Coletta, <i>Chief Financial Officer</i>
4:30 p.m.	Reception , Madison Room, Lotte New York Palace Hotel	

(F) Fireside Chat

(P) Panel Presentation

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Thursday, June 6

7:30 a.m.	Registration and continental breakfast, 2nd floor	
Room	Villard Ballroom	Reid Salon
8:00 a.m.	Canadian National Railway Co F Jean-Jacques Ruest, <i>President & CEO</i>	Ford Motor Co F Joe Hinrichs, <i>President, Automotive</i>
8:45 a.m.	Canadian Pacific Railway Ltd F Nadeem Velani, <i>Executive Vice President & CFO</i>	Cummins Inc F Mahesh Narang, <i>Vice President, Emission Solutions</i> James Hopkins, <i>Executive Director, IR</i>
9:30 a.m.	CSX Corp F James M. Foote, <i>President & CEO</i>	KLA Corporation Rick Wallace, <i>President & CEO</i>
10:15 a.m.	United Parcel Service Inc Richard Peretz, <i>Chief Financial Officer</i>	HEICO F Laurans Mendelson, <i>Chairman & CEO</i> Victor Mendelson, <i>Co-President</i> Carlos Macau, <i>Executive Vice President & CFO</i>
11:00 a.m.	Spirit AeroSystems Holdings Inc F Tom Gentile, <i>President & CEO</i> Jose Garcia, <i>Senior Vice President & CFO</i>	3M Co F Nick Gangestad, <i>Senior Vice President & CFO</i>
11:45 a.m.	Lunch will be available on the 2nd Floor	
12:00 p.m.	When will we see autonomous ride sharing? P  Timothy Papandreou, <i>Founder, Emerging Transport Advisors</i> Evangelos Simoudis, PhD, <i>Founder & MD, Synapse Partners</i> Bryan Reimer, PhD, <i>Research Scientist, MIT Sloan School of Management</i>	Federal Signal Corporation Ian Hudson, <i>Chief Financial Officer</i> Svetlana Vinokur, <i>Vice President, Treasurer & Corporate Development</i>
12:45 p.m.	When will we see autonomous delivery? P  Daniel J. Laury, <i>Chief Executive Officer, udelv</i>	Barnes Group Inc F Chris Stephens, <i>Senior Vice President & CFO</i>
1:30 p.m.	Who are the key suppliers for the AVs? P  Elliot Garbus, <i>Consultant, Elliot Garbus Ventures</i> Blair LaCorte, <i>President, Aeye</i>	IDEX Corporation William Grogan, <i>Chief Financial Officer</i>
2:15 p.m.	When will cars fly? P  John Polo, <i>Chief Operating Officer, Top Flight Technologies</i>	Clean Harbors Inc F Michael Battles, <i>Chief Financial Officer</i> Jim Buckley, <i>Senior Vice President, IR</i>
3:00 p.m.	What are the infrastructures & regulatory challenges of AVs? P  Professor Kaan Ozbay PhD, <i>Director, C2SMART Center at NYU</i> Garrett Eucalitto, <i>Transportation Program Director, National Governor's Association</i>	
3:45 p.m.	What is the future of space travel?  Paul Wooster, <i>Principal Mars Development Engineer, SpaceX</i>	Hillenbrand, Inc Joe Raver, <i>President & CEO</i>
4:30 p.m.	Conference presentations conclude, one-on-one meetings continue	
5:00 p.m.	Conference concludes	

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Companies hosting one-on-one meetings

listed by day

Wednesday, June 5

BAE Systems

Dana, Inc.

Embraer SA

Fluidra S.A.

Gates Industrial

General Electric

Heartland Express

Honda Motor Co.

Meritor

MTU Aero Engines Holding AG

Rockwell Automation

SiteOne Landscape Supply

Teradyne, Inc

Toyota Motor Corporation

TPI Composites, Inc.

Thursday, June 6

Embraer SA

Flowserve Corporation

Fluidra S.A.

Huntington Ingalls

KBR Inc

Kirby Corporation

Linamar Corporation

Lockheed Martin Corporation

NESCO Specialty Rentals / Capitol Investment Corp. IV

Nordson Corporation

Snap-on Incorporated

TransDigm Group

Traxion

United Rentals, Inc.

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