



A Stifel Company

KEEFE, BRUYETTE & WOODS  
**2017 MORTGAGE FINANCE &  
 ASSET MANAGEMENT CONFERENCE**

**Thursday, June 1, 2017**

Track A		Track B		Track C
7:00 AM <b>Registration &amp; Breakfast</b>				
7:55 AM <b>Welcome &amp; Opening Remarks</b> – Fred Cannon, Director of Research, KBW				
8:00 AM	MFA Financial, Inc. (MFA)	The Howard Hughes Corp. (HHC)		<i>No presentation at this time</i>
8:35 AM	CYS Investments, Inc. (CYS)	Ares Commercial Real Estate Corporation (ACRE)		OM Asset Management (OMAM)
9:10 AM	Capstead Mortgage Corporation (CMO)	Walker & Dunlop (WD)		AllianceBernstein Holding LLP (AB)
9:45 AM	Redwood Trust, Inc. (RWT)	HFF, Inc. (HFF)		Eaton Vance Corp. (EV)
10:20 AM	Radian Group, Inc. (RDN)	Blackstone Mortgage Trust, Inc. (BXMT)		Federated Investors (FII)
10:55 AM	MGIC Investment Corporation (MTG)	iStar Inc. (STAR)		Hamilton Lane Advisors (HLNE)
11:30 AM	AGNC Investment Corp. (AGNC)	Ellington Financial LLC (EFC)		Oaktree Capital Group LLC (OAK)
12:00 PM <b>Conference Luncheon</b>				
<b>KEYNOTE Speaker</b> – Michael Fratantoni, Mortgage Bankers Association, "MBA's Mortgage Finance Outlook"				
1:00 PM	NMI Holdings, Inc. (NMIH)	<i>No presentation at this time</i>		Brookfield Asset Management (BAM)
1:35 PM	Fidelity National Financial, Inc. (FNF)	Apollo Commercial Real Estate (ARI)		Ares Management (ARES)
2:10 PM	First American Financial Corporation (FAF)	Colony NorthStar, Inc. (CLNS)		<i>No presentation at this time</i>
2:45 PM	Federal Agricultural Mortgage Corporation (AGM)	Starwood Property Trust, Inc. (STWD)		<i>No presentation at this time</i>
3:20 PM	Invesco Mortgage Capital, Inc. (IVR)	Ladder Capital Corp. (LADR)		<i>No presentation at this time</i>
3:55 PM	New York Mortgage Trust, Inc. (NYMT)	Dynex Capital, Inc. (DX)		<i>No presentation at this time</i>
4:25 PM <b>Adjournment</b>				

**Companies hosting small group meetings only:** AMG, BLK, ECPG, MDLY, MITT, PMT/PFSI, PZN, SEIC