



A Stifel Company

# KEEFE, BRUYETTE & WOODS 2016 MORTGAGE FINANCE CONFERENCE

**Wednesday, June 1, 2016**

Track A		Track B		Track C	
7:00 AM <b>Registration &amp; Breakfast</b>					
7:55 AM <b>Welcome &amp; Opening Remarks</b> – Thomas Michaud, President & CEO, KBW					
8:00 AM	NMI Holdings, Inc. (NMIH)	<i>No presentation at this time</i>		Starwood Property Trust, Inc. (STWD)	
8:40 AM	CYS Investments, Inc. (CYS)	RE/MAX Holdings, Inc. (RMAX)		Apollo Commercial Real Estate Finance, Inc. (ARI)	
9:20 AM	Two Harbors Investment Corp. (TWO)	<i>No presentation at this time</i>		HFF, Inc. (HF)	
10:00 AM	Radian Group, Inc. (RDN)	<i>No presentation at this time</i>		Walker & Dunlop, Inc. (WD)	
10:40 AM	MGIC Investment Corp. (MTG)	Ellington Financial (EFC)		Mack Real Estate Group	
11:20 AM	American Capital Agency Corp. (AGNC)	New York Mortgage Trust, Inc. (NYMT)		Blackstone Mortgage Trust (BXMT)	
12:00 PM <b>Luncheon with Company Managements &amp; Keynote Speaker ~ David Stevens, President &amp; CEO, Mortgage Bankers Association</b>					
1:20 PM	MFA Financial, Inc. (MFA)	<i>No presentation at this time</i>		American Homes 4 Rent (AMH)	
2:00 PM	Redwood Trust, Inc. (RWT)	Federal Agricultural Mortgage Corp. (AGM)		Ladder Capital Corp. (LADR)	
2:40 PM	Flagstar Bancorp, Inc. (FBC)	Dynex Capital, Inc. (DX)		Ares Commercial Real Estate Corporation (ACRE)	
3:20 PM	Capstead Mortgage Corp. (CMO)	<i>No presentation at this time</i>		<i>No presentation at this time</i>	
4:00 PM <b>Adjournment</b> (meetings to continue until 4:35pm)					

**Companies hosting small group meetings only:** CIM, CLGX, DHI, FNF/FNFV, IVR, MITT, NRZ, PMT/PFSI, TOL

\*All presentations are 35 minutes with a 5 minute change-over