



A Stifel Company

# KEEFE, BRUYETTE & WOODS 2019 REAL ESTATE FINANCE & ASSET MANAGEMENT CONFERENCE

NEW YORK CITY

Thursday, May 30, 2019

Track A		Track B	Track C
7:00 AM Registration & Breakfast			
7:55 AM Welcome & Opening Remarks – Fred Cannon, Director of Research, KBW			
8:00 AM	Jones Lang LaSalle Incorporated (JLL)	Redwood Trust, Inc. (RWT)	Waddell & Reed Financial, Inc. (WDR)
8:40 AM	<b>Industry Roundtable:</b> Exantas Capital Corp. (XAN), Ready Capital Corporation (RC)	<i>No presentation at this time</i>	Brookfield Asset Management (BAM)
9:20 AM	iStar, Inc. (STAR)	Two Harbors Investment Corp. (TWO)	Victory Capital Holdings, Inc. (VCTR)
10:00 AM	<b>Industry Roundtable:</b> Ares Commercial Real Estate Corporation (ACRE), Granite Point Mortgage Trust (GPMT)	Fidelity National Financial (FNF)	Hamilton Lane Incorporated (HLNE)
10:40 AM	<b>Industry Roundtable:</b> Apollo Commercial Real Estate Finance (ARI), Blackstone Mortgage Trust (BXMT), KKR Real Estate Finance Trust (KREF), Starwood Property Trust (STWD)	Essent Group Ltd. (ESNT)	SEI Investments Co. (SEIC)
11:25 AM	<b>Industry Roundtable:</b> Marcus & Millichap (MMI), Newmark Group (NMRK), Walker & Dunlop (WD)	MGIC Investment Corporation (MTG)	<i>No presentation at this time</i>
12:00 PM Conference Luncheon & Fireside Chat Ares Management (ARES) CEO Michael Arougheti			
1:00 PM	<b>Non-QM Origination:</b> Ellington Financial (EFC), Redwood Trust, Inc. (RWT), Starwood Property Trust (STWD), Angel Oak Capital	AGNC Investment Corp. (AGNC)	Toll Brothers, Inc. (TOL)
1:40 PM	<b>Spotlight on Agency MBS:</b> Capstead Mortgage Corp (CMO), Dynex Capital (DX), Invesco Mortgage Capital (IVR)	Realogy Holdings Corp. (RLGY)	NMI Holdings (NMIH)
2:20 PM	<b>Opportunities in Residential Credit:</b> New York Mortgage Trust (NYMT), MFA Financial, Inc. (MFA), Western Asset Mortgage Capital Corp (WMC)	<i>No presentation at this time</i>	<i>No presentation at this time</i>
3:00 PM	<b>Opportunities in Private Credit:</b> Bain Capital Specialty Finance (BCSF), FS KKR Capital (FSK), TPG Specialty Lending (TSLX)	<i>No presentation at this time</i>	<i>No presentation at this time</i>
3:35 PM Adjournment			

Companies hosting small group meetings only: AB, AZM.IM, BLK, BSIG, COOP, CLGX, CNS, EV, KKR, LADR, LAZ, MITT, NRZ

\* all fireside chats and panels are 35 minutes