

EVERCORE ISI

CONSUMER AND RETAIL CONFERENCE

JUNE 13-15, 2023



FIRESIDE CHAT SCHEDULE

*All Times are Eastern Standard Time (EST)

Day 1 – Tuesday, June 13th, 2023

8:00am – 8:35am	Colgate-Palmolive Company (CL) Hosted by Robert Ottenstein Mukul Deoras – <i>President, Asia/Pacific</i> John Faucher – <i>Chief Investor Relations Officer & Senior Vice President, M&A</i>	
8:45am – 9:20am	Heineken N.V. (HEIA) Hosted by Robert Ottenstein Dolf van den Brink – <i>Chairman of the Board & Chief Executive Officer</i>	
8:45am – 9:20am	Xponential Fitness Inc. (XPOF) Hosted by Warren Cheng Anthony Geisler – <i>Chief Executive Officer</i> John Meloun – <i>Chief Financial Officer</i>	
9:30am – 10:05am	Brinker International (EAT) Hosted by David Palmer Kevin Hochman – <i>President & Chief Executive Officer</i> Joe Taylor – <i>Senior Vice President & Chief Financial Officer</i>	
10:15am – 10:50am	Hain Celestial (HAIN) Hosted by David Palmer Chris Bellairs – <i>Chief Financial Officer</i> Curtiss Bruce – <i>Senior Vice President, Financial Planning & Analysis</i>	
11:00am – 11:35am	Restaurant Brands International (QSR) Hosted by David Palmer Tom Curtis – <i>President of Burger King US&C</i>	
11:45am – 12:20pm	Break	
12:30pm – 1:05pm	Circana (Private): CPG/Food Service Presentation Don Unser – <i>President, Thought Leadership</i> Alastair Steel – <i>Client Engagement</i>	
1:15pm – 1:50pm	The Vita Coco Company (COCO) Hosted by Robert Ottenstein Martin Roper - <i>Chief Executive Officer</i>	
2:00pm – 2:35pm	Break	
2:45pm – 3:20pm	Nutrabolt (Private) Hosted by Robert Ottenstein Doss Cunningham – <i>Chairman & Chief Executive Officer</i>	
3:30pm – 4:05pm	Macro Panel with Haverty & Georgica Auto Holdings Hosted by Oscar Sloterbeek Jonathan Sobel – <i>Managing Member, Georgica Auto Holdings</i> Clarence Smith – <i>Chief Executive Officer, Haverty</i> Richard Hare – <i>Chief Financial Officer, Haverty</i>	
4:15pm – 4:50pm	Circana (Private): Total Retail Presentation Don Unser – <i>President, Thought Leadership</i> Marshal Cohen – <i>Chief Industry Advisor, Retail</i>	

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FIRESIDE CHAT SCHEDULE

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Day 2 – Wednesday, June 14th, 2023

8:00am – 8:35am

Coty Inc. (COTY)

Hosted by Robert Ottenstein
 Sue Y. Nabi – *Chief Executive Officer*
 Gordon von Bretten – *Chief Transformation Officer*
 Anna von Bayern – *Chief Corporate Affairs Officer*



COTY
SINCE 1904

8:00am – 8:35am

Frank Blake – Former CEO of Home Depot
Pine Needles Investments (Private)

Hosted by Greg Melich

8:45am – 9:20am

Wendy's Company (WEN)

Hosted by David Palmer
 Gunther Plosch – *Chief Financial Officer*



Wendy's
THE WENDY'S COMPANY

9:30am – 10:05am

Krispy Kreme (DNUT)

Hosted by David Palmer
 Mike Tattersfield – *Chief Executive Officer*
 Jeremiah Ashukian – *Chief Financial Officer*



Krispy Kreme
DOUGHNUTS

10:15am – 10:50am

Walmart Inc. (WMT)

Hosted by Greg Melich
 John David Rainey – *Executive Vice President & Chief Financial Officer*



Walmart

11:00am – 11:35am

Molson Coors Beverage Company (TAP)

Hosted by Robert Ottenstein
 Gavin Hattersley – *President & Chief Executive Officer*



MOLSON
COORS

11:45am – 12:20pm

Coca-Cola Europacific Partners (CCEP)

Hosted by Robert Ottenstein
 Nik Jhangiani – *Chief Financial Officer*



Coca-Cola
EUROPACIFIC
PARTNERS

12:30pm – 1:05pm

Carter's, Inc. (CRI)

Hosted by Warren Cheng
 Mike Casey – *Chairman & Chief Executive Officer*
 Richard Westenberger – *Executive Vice President & Chief Financial Officer*
 Brian Lynch – *President & Chief Operating Officer*



carter's, inc.

1:15pm – 1:50pm

Wayfair Inc. (W)

Hosted by Oliver Wintermantel
 James Lamb – *Head of Investor Relations*
 Ryan Barney – *Associate Director of Investor Relations*



wayfair

2:00pm – 2:35pm

Skechers U.S.A., Inc. (SKX)

Hosted by Warren Cheng
 John Vandemore – *Chief Financial Officer*



SKECHERS

2:45pm – 3:20pm

Celsius Holdings, Inc. (CELH)

Hosted by Robert Ottenstein
 John Fieldly – *Chief Executive Officer*
 Jarrod Langhans – *Chief Financial Officer*



CELSIUS
THE FIT

3:30pm – 4:05pm

Break

4:15pm – 4:50pm

Campbell Soup Company (CPB)

Hosted by David Palmer
 Mark Clouse – *President & Chief Executive Officer*
 Carrie Anderson – *Executive Vice President & Chief Financial Officer*



Campbell's

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FIRESIDE CHAT SCHEDULE

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Day 3 – Thursday, June 15th, 2023

8:45am – 9:20am	Kellogg Company (K) Hosted by David Palmer Steve Cahillane – <i>Chairman of the Board & Chief Executive Officer</i>	
9:30am – 10:05am	AB-InBev (BUD) Hosted by Robert Ottenstein Fernando Tennenbaum – <i>Chief Financial Officer</i>	
10:15am – 10:50am	The Duckhorn Portfolio (NAPA) Hosted by Robert Ottenstein Alex Ryan – <i>President, Chief Executive Officer & Chairman</i> Lori Beaudoin – <i>Executive Vice President & Chief Financial Officer</i> Sean Sullivan – <i>Executive Vice President & Chief Strategy and Legal Officer</i>	
11:00am – 11:35am	Break	
11:45am – 12:20pm	Hostess Brands (TWNK) Hosted by David Palmer Andy Callahan – <i>President & Chief Executive Officer</i> Travis Leonard – <i>Chief Financial Officer</i>	
12:30pm – 1:05pm	Genuine Parts Company (GPC) Hosted by Greg Melich Bert Nappier – <i>Executive Vice President & Chief Financial Officer</i> Will Stengel – <i>President & Chief Operating Officer</i>	
1:15pm – 1:50pm	Kraft Heinz (KHC) Hosted by David Palmer Andre Maciel – <i>Executive Vice President & Global Chief Financial Officer</i>	
1:15pm – 1:50pm	Dufry (DUFY) Hosted by Javier Escalante Xavier Rossinyol – <i>Chief Executive Officer</i> Yves Gerster – <i>Chief Financial Officer</i>	
2:45pm – 3:20pm	Costco (COST) Hosted Greg Melich David Sherwood – <i>Director, Financial Planning & Investor Relations</i>	

COMPANIES HOSTING 1X1'S ONLY

Ambev (ABEV)

Arca Continental (AC)

B&G Foods (BGS)

BellRing Brands, Inc. (BRBR)

Best Buy Co., Inc. (BBY)

BJ's Wholesale Club Holdings, Inc. (BJ)

Build-A-Bear Workshop, Inc. (BBW)

Coca Cola FEMSA (KOFMX)

Coca Cola HBC AG (CCH)

Five Below, Inc. (FIVE)

Post Holdings (POST)

Reckitt (RBGLY)

Target Corporation (TGT)

The Estee Lauder Companies (EL)

The Home Depot, Inc. (HD)

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PARTICIPATING COMPANIES

AB-InBev (BUD)

June 14th & 15th – 1x1 Meetings and Fireside Chat

- Fernando Tennenbaum – *Chief Financial Officer*
- Cyrus Nentin – *Global Director, Investor Relations*
- Shaun Fullalove – *Vice President, Investor Relations*

Ambev (ABEV)

June 13th – 1x1 Meetings Only

- Jean Jereissati – *Chief Executive Officer*
- Lucas Lira – *Chief Financial Officer*

Arca Continental (AC)

June 14th & 15th – 1x1 Meetings Only

- Raymundo Treviño Montalvo – *Investor Relations Leader*
- Pamela Ortiz Sanchez – *Investor Relations Manager*

B&G Foods (BGS)

June 15th – 1x1 Meetings Only

- Casey Keller – *Chief Executive Officer*
- Bruce Wacha – *Chief Financial Officer*

BellRing Brands, Inc. (BRBR)

June 13th – 1x1 Meetings Only

- Darcy Davenport – *President & Chief Executive Officer*
- Paul Rode – *Chief Financial Officer*
- Jennifer Meyer – *Senior Director, Investor Relations & Corporate Finance*

Best Buy Co., Inc. (BBY)

June 15th – 1x1 Meetings Only

- Corie Barry – *Chief Executive Officer*
- Matt Bilunas – *Chief Financial Officer*

BJ's Wholesale Club Holdings, Inc (BJ)

June 14th – 1x1 Meetings Only

- Cathie Park – *Vice President, Investor Relations*

Brinker International (EAT)

June 13th – 1x1 Meeting and Fireside Chat

- Kevin Hochman – *President & Chief Executive Officer*
- Joe Taylor – *Senior Vice President & Chief Financial Officer*
- Mika Ware – *Vice President, Finance and Investor Relations*

Build-A-Bear Workshop, Inc. (BBW)

June 13th, 14th & 15th – 1x1 Meetings Only

- Sharon John – *Chief Executive Officer*
- Voin Todorovic – *Chief Financial Officer*

Campbell Soup (CPB)

June 14th & 15th – 1x1 Meetings and Fireside Chat

- Mark Clouse – *President & Chief Executive Officer*
- Carrie Anderson – *Executive Vice President & Chief Financial Officer*
- Rebecca Gardy – *Senior Vice President & Chief Investor Relations Officer*

Carter's, Inc. (CRI)

June 14th – 1x1 Meetings and Fireside Chat

- Mike Casey – *Chairman & Chief Executive Officer*
- Richard Westenberger – *Executive Vice President & Chief Financial Officer*
- Brian Lynch – *President & Chief Operating Officer*
- Sean McHugh – *Vice President & Treasurer*

Celsius Holdings, Inc. (CELH)

June 14th – 1x1 Meetings and Fireside Chat

- John Fieldly – *Chief Executive Officer*
- Jarrod Langhans – *Chief Financial Officer*
- Toby David – *Executive Vice President*
- Cameron Donahue – *Investor Relations*

Circana (Private)

June 13th – Fireside Chat Only

- Don Unser – *President, Thought Leadership*
- Marshall Cohen – *Chief Industry Advisor, Retail*
- Alastair Steel – *Client Engagement*

Coca-Cola Europacific Partners (CCEP)

June 14th – Fireside Chat Only

- Nik Jhangiani – *Chief Financial Officer*
- Claire Copps – *Associate Director, Investor Relations & Corporate Strategy*

Coca-Cola FEMSA (KOFMX)

June 14th & 15th – 1x1 Meetings Only

- Jorge Alejandro Callazo Pereda – *Investor Relations Director*
- Lorena Martin Lara – *Investor Relations Manager*

Coca-Cola HBC AG (CCH)

June 14th – 1x1 Meetings Only

- Jemima Benstead – *Investor Relations Manager*
- Marios Matar – *Investor Relations Manager*

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PARTICIPATING COMPANIES

Colgate-Palmolive Company (CL)June 13th – 1x1 Meetings and Fireside Chat

- Mukul Deoras – *President, Asia/Pacific*
- John Faucher – *Chief Investor Relations Officer & Senior Vice President, M&A*

Costco (COST)June 15th – Fireside Chat Only

- David Sherwood – *Director, Financial Planning & Investor Relations*

Coty, Inc. (COTY)June 14th – Fireside Chat Only

- Sue Y. Nabi – *Chief Executive Officer*
- Gordon von Bretten – *Chief Transformation Officer*
- Anna von Bayern – *Chief Corporate Affairs Officer*
- Olga Levinzon – *Senior Vice President, Head of Investor Relations*
- Colleen Naber – *Senior Manager, Investor Relations*

Dufry (DUFY)June 13th – 1x1 Meetings and Fireside Chat

- Xavier Rossinyol – *Chief Executive Officer*
- Yves Gerster – *Chief Financial Officer*
- Kristin Kohler – *Global Head of Investor Relations*

Five Below, Inc. (FIVE)June 15th – 1x1 Meetings Only

- Ken Bull – *Chief Operating Officer*
- Christiane Pelz – *Vice President, Investor Relations & Treasury*

Frank Blake, Former CEO of Home Depot**Pine Needles Investments (Private)**June 14th - 1x1 Meetings and Fireside Chat

- Frank Blake - *Principal*

Genuine Parts (GPC)June 15th – 1x1 Meetings and Fireside Chat

- Bert Nappier – *Executive Vice President & Chief Financial Officer*
- Will Stengel – *President & Chief Operating Officer*
- Sid Jones – *Senior Vice President, Investor Relations*
- Tim Walsh – *Senior Director, Investor Relations*

Georgica Auto Holdings (Private)June 13th – Fireside Chat Only

- Jonathan Sobel – *Managing Member*

Hain Celestial (HAIN)June 13th – 1x1 Meetings and Fireside Chat

- Chris Bellairs – *Chief Financial Officer*
- Curtiss Bruce – *Senior Vice President, Financial Planning & Analysis*
- Alexis Tessier – *Vice President, Investor Relations*

Haverty (HVT)June 13th – 1x1 Meetings and Fireside Chat

- Clarence Smith – *Chief Executive Officer*
- Richard Hare – *Chief Financial Officer*

Heineken N.V. (HEIA)June 13th & 14th – 1x1 Meetings and Fireside Chat

- Dolf van den Brink – *Chairman of the Board & Chief Executive Officer*
- Federico Castillo Martinez – *Director, Investor Relations*

Hostess Brands (TWNK)June 15th – 1x1 Meetings and Fireside Chat

- Andy Callahan – *President & Chief Executive Officer*
- Travis Leonard – *Chief Financial Officer*
- Amit Sharma – *Vice President, Investor Relations*

Kellogg Company (K)June 15th – 1x1 Meetings and Fireside Chat

- Steve Cahillane – *Chairman of the Board & Chief Executive Officer*
- John Renwick - *Vice President, Investor Relations & Corporate Planning*
- Jamie Duies – *Director, Investor Relations & Corporate Strategy*

Kraft Heinz (KHC)June 15th – 1x1 Meetings and Fireside Chat

- Andre Maciel – *Executive Vice President & Global Chief Financial Officer*
- Anne-Marie Megela – *Vice President, Head of Global Investor Relations*

Krispy Kreme (DNUT)June 14th – 1x1 Meetings and Fireside Chat

- Mike Tattersfield – *Chief Executive Officer*
- Jeremiah Ashukian – *Chief Financial Officer*

Molson Coors Beverage Company (TAP)June 14th – 1x1 Meetings and Fireside Chat

- Gavin Hattersley – *President & Chief Executive Officer*
- Greg Tierney – *Vice President, FP&A and Investor Relations*
- Traci Mangini – *Director, Investor Relations*

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PARTICIPATING COMPANIES

Nutrabolt (Private)June 13th – Fireside Chat Only

- Doss Cunningham – *Chairman & Chief Executive Officer*

Post Holdings (POST)June 14th & 15th – 1x1 Meetings Only

- Rob Vitale – *Chief Executive Officer*
- Matt Mainer – *Chief Financial Officer*
- Joe Kinsey – *Corporate Development*
- Daniel O'Rourke – *Investor Relations*

Reckitt (RBGLY)June 14th & 15th – 1x1 Meetings Only

- Richard Joyce – *Head of Investor Relations*
- Hazel Chung – *Deputy Head of Investor Relations*

Restaurant Brands International (QSR)June 13th – 1x1 Meetings and Fireside Chat

- Tom Curtis – *President of Burger King US&C*
- Kendall Peck – *Head of Investor Relations*
- Valerie Macaulay – *Senior Manager, Investor Relations*

Skechers U.S.A., Inc. (SKX)June 14th – 1x1 Meetings and Fireside Chat

- John Vandemore – *Chief Financial Officer*
- Eunice Han – *Senior Manager, Investor Relations*

Target Corporation (TGT)June 15th – 1x1 Meetings Only

- Justin Madsen – *Senior Director, Investor Relations*
- John Hulbert – *Vice President, Investor Relations*

The Duckhorn Portfolio (NAPA)June 15th – 1x1 Meetings and Fireside Chat

- Alex Ryan – *President & Chief Executive Officer & Chairman*
- Lori Beaudoin – *Executive Vice President & Chief Financial Officer*
- Sean Sullivan – *Executive Vice President, Chief Strategy & Legal Officer*
- Chris Mandeville – *Managing Director, Investor Relations*

The Estee Lauder Companies (EL)June 14th – 1x1 Meetings Only

- Beth Kite – *Vice President, Investor Relations*
- Jenn Ellis – *Executive Director, Investor Relations*

The Home Depot, Inc. (HD)June 15th – 1x1 Meetings Only

- Steph Wissink – *Senior Vice President, Head of Investor Relations*
- Isabel Janci – *Vice President, Investor Relations & Treasury*
- Lyndsey Burton – *Director, Investor Relations & ESG*
- Jacob Ashcraft – *Director, Investor Relations*

The Vita Coco Company (COCO)June 13th, 14th & 15th – 1x1 Meetings and Fireside Chat

- Martin Roper – *Chief Executive Officer*

Walmart Inc. (WMT)June 14th – 1x1 Meetings and Fireside Chat

- John David Rainey – *Executive Vice President & Chief Financial Officer*
- Steph Wissink – *Senior Vice President, Head of Investor Relations*
- Kary Brunner – *Senior Director II, Investor Relations*

Wayfair Inc. (W)June 14th – 1x1 Meetings and Fireside Chat

- James Lamb – *Head of Investor Relations*
- Ryan Barney – *Associate Director of Investor Relations*

Wendy's Company (WEN)June 14th – 1x1 Meetings and Fireside Chat

- Gunther Plosch – *Chief Financial Officer*
- Kelsey Freed – *Director, Investor Relations*
- Lauren Dunbar – *Manager, Investor*

Xponential Fitness (XPOF)June 13th – Fireside Chat Only

- Anthony Geisler – *Chief Executive Officer*
- John Meloun – *Chief Financial Officer*
- Andrea Mihic – *Vice President, Corporate Development*