



SCHEDULE OF LARGE GROUP PRESENTATIONS

**All Times are Eastern Standard Time (EST)*

Tuesday, March 5, 2024

Event Location: Lotte New York Palace Hotel: 455 Madison Avenue, 4th Floor, New York, NY 10022

8:00am – 8:30am

Cummins Inc. (CMI)

Brett Merritt – *VP & President, Engine Business*
Chris Clulow – *VP of Investor Relations*
David Heckman – *Investor Relations Manager*

8:40am – 9:10am

The Timken Company (TKR)

Philip Fracassa – *EVP & Chief Financial Officer*

9:20am – 9:50am

Daimler Truck Holding AG (DTG-ETR)

Martin Daum – *Chief Executive Officer*

10:00am – 10:30am

Terex Corporation (TEX)

Simon Meester – *Chief Executive Officer*
Julie Beck – *SVP & Chief Financial Officer*

10:40am – 11:10am

CNH Industrial NV (CNHI)

Oddone Incisa – *Chief Financial Officer*
Jason Omerza – *Investor Relations*

11:20am – 11:50am

Parker Hannifin Corporation (PH)

Todd Leombruno – *EVP & Chief Financial Officer*
Jeff Müller – *VP, Investor Relations*
Yan Huo – *Director, Investor Relations*

12:00pm – 1:00pm

Keynote Lunch Presentation: “The Intersection Of Macroeconomics, Monetary Policy, Fiscal Policy, Trade And China In A US Election Year”

Ed Hyman – *Chairman of Evercore ISI*
Krishna Guha – *Vice Chairman of Evercore ISI, Head of Global Policy & Central Bank Strategy*
Sarah Bianchi – *Senior Managing Director and Chief Strategist of International Political Affairs and Public Policy at Evercore ISI*
Neo Wang – *Managing Director and China Strategist at Evercore ISI*
Moderated By: David Raso – *Senior Managing Director & Partner, Head of Industrial Research at Evercore ISI*

1:10pm – 1:40pm

China Yuchai International (CYD)

Weng Ming Hoh – *President*
Kelvin Lai – *VP of Operations*

1:50pm - 2:20pm

Oshkosh Corp (OSK)

Mike Pack – *EVP & Chief Financial Officer*
Patrick Davidson – *SVP, Investor Relations*

2:30pm – 3:00pm

Finning International Inc. (FTT-TSE)

Kevin Parkes – *President & Chief Executive Officer*

3:10pm – 3:40pm

United Rentals, Inc. (URI)

Matthew Flannery – *Chief Executive Officer* *
Ted Grace – *Chief Financial Officer*
Elizabeth Grenfell – *VP, Investor Relations*

3:50pm – 4:20pm

EMCOR Group, Inc. (EME)

Tony Guzzi – *Chairman, President & Chief Executive Officer*

4:30pm – 5:00pm

Montrose Environmental Group (MEG)

Vijay Manthripragada – *President & Chief Executive Officer*
Allan Dicks – *Chief Financial Officer*

** URI's CEO only participating in Large Group Presentation*

Wi-Fi Information
Username – evercoreisi
Password - evercoreisi

COMPANIES HOSTING 1X1'S ONLY

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|---|---|--|
| <ul style="list-style-type: none"> • Caterpillar, Inc (CAT) • Eaton Corp PLC (ETN) • ESAB Corporation (ESAB) | <ul style="list-style-type: none"> • Herc Holdings (HRI) • Ingersoll Rand (IR) • Union Pacific Corporation (UNP) | <ul style="list-style-type: none"> • Volvo Group AB (VOLV.B-OME) • Vontier Corp. (VNT) |
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Caterpillar Inc (CAT)



1x1 Meetings Only | David Raso

- Ogi Redzic – VP, CAT Digital
- Ryan Fiedler – VP, Investor Relations
- Rob Rengel – Senior Manager, Investor Relations

China Yuchai International (CYD) *



1x1 Meetings & Large Group Presentation | David Raso

- Weng Ming Hoh – President
- Kelvin Lai – VP of Operations

CNH Industrial NV (CNHI)



1x1 Meetings & Large Group Presentation | David Raso

- Oddone Incisa – Chief Financial Officer
- Jason Omerza – Investor Relations

Cummins Inc (CMI)



1x1 Meetings & Large Group Presentation | David Raso

- Brett Merritt – VP & President, Engine Business
- Chris Clulow – VP of Investor Relations
- David Heckman – Investor Relations Manager

Daimler Truck Holding AG (DTG-ETR)



1x1 Meetings & Large Group Presentation | David Raso

- Martin Daum – Chief Executive Officer
- Christian Herrmann – Head of Investor Relations and M&A
- Claus Baessler – Vice President Treasury & Tax, Acting Head of Finance & Controlling

Eaton Corp PLC (ETN)



1x1 Meetings Only | David Raso

- Paulo Ruiz – President & Chief Operating Officer, Industrial Sector
- Yan Jin – SVP, Investor Relations

EMCOR Group, Inc. (EME)



1x1 Meetings & Large Group Presentation | Durgesh Chopra

- Tony Guzzi – Chairman, President & Chief Executive Officer
- Jason Nalbandian – SVP & Chief Accounting Officer
- Andy Backman – VP, Investor Relations
- Kevin Matz – EVP, Shared Services

ESAB Corporation (ESAB)



1x1 Meetings Only | David Raso

- Kevin Johnson – Chief Financial Officer
- Mark Barbalato – VP, Investor Relations

Finning International Inc (FTT-TSE)



1x1 Meetings & Large Group Presentation | David Raso

- Kevin Parkes – President & Chief Executive Officer

Herc Holdings (HRI)



1x1 Meetings Only | David Raso

- Mark Humphrey – Chief Financial Officer
- Aaron Birnbaum – Chief Operating Officer
- Leslie Hunziker – SVP, Investor Relations, Communications & Sustainability

Ingersoll Rand Inc (IR)



1x1 Meetings Only | David Raso

- Vik Kini – Chief Financial Officer
- Matthew Fort – VP, Investor Relations
- Jon Volp – Senior Financial Analyst

Montrose Environmental Group (MEG)



1x1 Meetings & Large Group Presentation | Durgesh Chopra

- Vijay Manthripragada – President & Chief Executive Officer
- Allan Dicks – Chief Financial Officer

Oshkosh Corp (OSK)



1x1 Meetings & Large Group Presentation | David Raso

- Mike Pack – EVP & Chief Financial Officer
- Patrick Davidson – SVP, Investor Relations

Parker Hannifin Corporation (PH)



1x1 Meetings & Large Group Presentation | David Raso

- Todd Leombruno – EVP & Chief Financial Officer
- Jeff Miller – VP, Investor Relations
- Yan Huo – Director, Investor Relations

Terex Corporation (TEX) *



1x1 Meetings & Large Group Presentation | David Raso

- Simon Meester – Chief Executive Officer
- Julie Beck – SVP & Chief Financial Officer

The Timken Company (TKR)



1x1 Meetings & Large Group Presentation | David Raso

- Philip Fracassa – EVP & Chief Financial Officer

Union Pacific Corporation (UNP)



1x1 Meetings Only | Jonathan Chappell

- Jennifer Hamann – EVP & Chief Financial Officer
- Brad Stock – AVP Investor Relations
- Kenny Rocker – EVP, Marketing & Sales

United Rentals, Inc (URI)



1x1 Meetings & Large Group Presentation | David Raso

- Matthew Flannery - Chief Executive Officer **
- Ted Grace – Chief Financial Officer
- Elizabeth Grenfell – VP, Investor Relations

Volvo Group AB (VOLV.B-OME) * VOLVO

1x1 Meetings Only | David Raso

- Mats Backman – Chief Financial Officer
- Johan Bartler – SVP, Investor Relations

Vontier Corp. (VNT)



1x1 Meetings Only | David Raso

- Anshooman Aga – Chief Financial Officer

* CYD, TEX & VOLV.B-OME participating virtually

** URI's CEO only participating in Large Group Presentation