

## EVERCORE ISI

CONSUMER AND RETAIL CONFERENCE

JUNE 11-13, 2024 | VIRTUAL



## FIRESIDE CHAT SCHEDULE

\*All Times are Eastern Standard Time (EST)

Day 1 – Tuesday, June 11<sup>th</sup>, 2024

8:00am – 8:35am

**Texas Roadhouse, Inc. (TXRH)**Hosted by David Palmer  
Chris Colson – *Chief Legal & Administrative Officer*

8:45am – 9:20am

**Pernod Ricard (PRNDY-OTCMKTS)**Hosted by Robert Ottenstein  
Alexandre Ricard – *Chairman & Chief Executive Officer*  
Florence Tresarrieu – *Global SVP, Investor Relations & Treasury*

9:30am – 10:05am

**Kellanova (K)**Hosted by David Palmer  
Steve Cahillane – *Chairman, President & Chief Executive Officer*

10:15am – 10:50am

**AB InBev (BUD)**Hosted by Robert Ottenstein  
Fernando Tennenbaum – *Chief Financial Officer*

11:00am – 11:35am

**Bath and Body Works (BBWI)**Hosted by Warren Cheng  
Eva Boratto – *Chief Financial Officer*

11:45am – 12:20pm

**Yum! Brands, Inc. (YUM)**Hosted by David Palmer  
Chris Turner – *Chief Financial Officer*

12:30pm – 1:05pm

**Colgate-Palmolive Company (CL)**Hosted by Robert Ottenstein  
John Faucher – *Chief Investor Relations Officer & EVP, M&A*

1:15pm – 1:50pm

**WK Kellogg Co. (KLG)**Hosted by David Palmer  
Gary Pilnick – *Chief Executive Officer*  
David McKinstry – *Chief Financial Officer*

2:00pm – 2:35pm

**Skechers U.S.A., Inc. (SKX)**Hosted by Jesalyn Wong  
John Vandemore – *Chief Financial Officer*

2:45pm – 3:20pm

**Celsius (CELH)**Hosted by Robert Ottenstein  
John Fieldly – *Chief Executive Officer***State of Consumer Panel**Hosted by Oscar Sloterbeek  
Clarence Smith, *Chairman & Chief Executive Officer, Haverty*  
Richard Hare, *EVP & Chief Financial Officer, Haverty*  
David Rawlinson, *Chief Executive Officer, Quarate Retail*  
Jim Peters, *EVP & Chief Financial Officer, Whirlpool Corporation*

3:30pm – 4:05pm

**Williams-Sonoma, Inc. (WSM)**Hosted by Oliver Wintermantel  
Jeff Howie – *EVP & Chief Financial Officer*

4:15pm – 4:50pm

**Chipotle Mexican Grille, Inc. (CMG)**Hosted by David Palmer  
Brian Niccol – *Chairman & Chief Executive Officer*  
Jack Hartung – *Chief Financial & Administrative Officer*

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## FIRESIDE CHAT SCHEDULE

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Day 2 – Wednesday, June 12<sup>th</sup>, 2024

8:45am – 9:20am	<b>Amer Sports, Inc. (AS)</b> Hosted by Michael Binetti James Zheng – <i>Chief Executive Officer</i> Andrew Page – <i>Chief Financial Officer</i> Omar Saad – <i>Vice President, Finance &amp; Investor Relations</i>	
8:45am – 9:20am	<b>Genuine Parts Company (GPC)</b> Hosted by Greg Melich Will Stengel – <i>President &amp; Chief Executive Officer</i> Bert Nappier – <i>EVP &amp; Chief Financial Officer</i>	
9:30am – 10:05am	<b>Avolta, Formerly Dufry (AVOLTA)</b> Hosted by Javier Escalante Yves Gerster – <i>Chief Financial Officer</i>	
10:15am – 10:50am	<b>Walmart, Inc. (WMT)</b> Hosted by Greg Melich John David Rainey – <i>EVP &amp; Chief Financial Officer</i>	
11:00am – 11:35am	<b>Carter's, Inc. (CRI)</b> Hosted by Warren Cheng Mike Casey – <i>Chairman &amp; Chief Executive Officer</i> Richard Westenberger – <i>Chief Financial Officer &amp; Chief Operating Officer</i> Kendra Krugman – <i>Chief Creative &amp; Growth Officer</i>	
11:45am – 12:20pm	<b>Birkenstock (BIRK)</b> Hosted by Michael Binetti Oliver Reichert – <i>Chief Executive Officer</i> Erik Massmann – <i>Chief Financial Officer</i> David Kahan – <i>President &amp; Chief Executive Officer, Birkenstock Americas</i>	
12:30pm – 1:05pm	<b>Vita Coco (COCO)</b> Hosted by Greg Porter Martin Roper – <i>Chief Executive Officer</i> Corey Baker – <i>Chief Financial Officer</i>	
1:15pm – 1:50pm	<b>Hain Celestial Group, Inc. (HAIN)</b> Hosted by David Palmer Wendy Davidson – <i>President &amp; Chief Executive Officer</i> Lee Boyce – <i>EVP &amp; Chief Financial Officer</i>	
2:00pm – 2:35pm	<b>Xponential Fitness (XPOF)</b> Hosted by Warren Cheng John Meloun – <i>Chief Financial Officer</i>	
2:45pm – 3:20pm	<b>Revolve Group, Inc. (RVLV) REVOLVE</b> Hosted by Michael Binetti Michael Menté – <i>Co-Founder &amp; Co-Chief Executive Officer</i> Jesse Timmermans – <i>Chief Financial Officer</i>	<b>Molson Coors (TAP)</b> Hosted by Robert Ottenstein Tracey Joubert – <i>Chief Financial Officer</i> 
3:30pm – 4:05pm	<b>Wendy's Company (WEN)</b> Hosted by David Palmer Gunther Plosch – <i>Chief Financial Officer</i>	
4:15pm – 4:50pm	<b>Circana, formerly NPD Group (Private)</b> Hosted by Greg Melich & David Palmer Don Unser – <i>President, Thought Leadership</i> David Portalatin – <i>SVP &amp; Industry Advisor, Food &amp; Foodservice</i>	

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## FIRESIDE CHAT SCHEDULE

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Day 3 – Thursday, June 13<sup>th</sup>, 2024

8:45am – 9:20am	<b>Coca-Cola Europacific Partners (CCEP)</b> Hosted by Robert Ottenstein Damian Gammell – <i>Chief Executive Officer</i>	
9:30am – 10:05am	<b>Restaurant Brands International (QSR)</b> Hosted by David Palmer Patrick Doyle – <i>Executive Chairman</i> Josh Kobza – <i>Chief Executive Officer</i>	
10:15am – 10:50am	<b>Mondelez International (MDLZ)</b> Hosted by David Palmer Luca Zaramella – <i>EVP &amp; Chief Financial Officer</i>	
11:00am – 11:35am	<b>Coty, Inc. (COTY)</b> Hosted by Robert Ottenstein Sue Nabi – <i>Chief Executive Officer</i> Laurent Mercier – <i>Chief Financial Officer</i> Anna von Bayern – <i>Chief Corporate Affairs Officer</i> Olga Levinzon – <i>SVP, Investor Relations &amp; Head of M&amp;A</i> Colleen Naber – <i>Senior Manager, Investor Relations</i>	
11:45am – 12:20pm	<b>Circana Fashion Expert Marshal Cohen: Emerging Themes in Sneakers, Athleisure, and Beauty</b> Hosted by Michael Binetti Marshal Cohen – <i>Chief Retail Advisor</i>	
1:15pm – 1:50pm	<b>Canada Goose Holdings, Inc. (GOOS)</b> Hosted by Michael Binetti Beth Clymer – <i>President, Finance, Strategy, Administration &amp; Operations</i>	
2:00pm – 2:35pm	<b>Costco (COST)</b> Hosted by Greg Melich Gary Millerchip – <i>EVP &amp; Chief Financial Officer</i>	
3:30pm – 4:05pm	<b>Campbell Soup Company (CPB)</b> Hosted by David Palmer Mark Clouse – <i>President &amp; Chief Executive Officer</i> Carrie Anderson – <i>Chief Financial Officer</i>	

## COMPANIES HOSTING 1X1'S ONLY

Ambev S.A. (ABEV) B&G Foods (BGS) BellRing Brands, Inc. Best Buy Co., Inc. (BBY) Chewy (CHWY) Coca-Cola FEMSA (KOF) Coca-Cola HBC AG (CCH) Five Below, Inc. (FIVE)	Floor & Décor Holdings, Inc. (FND) Haverty (HVT) Heineken N.V. (HEIA) Nordstrom, Inc. (JWN) Philip Morris International (PM) Post Holdings (POST) Tapestry, Inc. (TPR) Target Corporation (TGT)	The Duckhorn Portfolio (NAPA) The Home Depot, Inc. (HD) The Kraft Heinz Company (KHC) The Sherwin-Williams Company (SHW) Victoria's Secret & Co. (VSCO) Wayfair (W) Kohl's Corporation (KSS)
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## PARTICIPATING COMPANIES

**AB-InBev (BUD)**June 11<sup>th</sup> & 13<sup>th</sup> – 1x1 Meetings and Fireside Chat

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

**Ambev S.A. (ABEV)**June 11<sup>th</sup> – 1x1 Meetings Only

- Jean Jereissati – *Chief Executive Officer*
- Lucas Lira – *Chief Financial Officer & Chief Investor Relations Officer*

**Amer Sports, Inc. (AS)**June 12<sup>th</sup> – Fireside Chat Only

- James Zheng – *Chief Executive Officer*
- Andrew Page – *Chief Financial Officer*
- Omar Saar – *VP, Finance & Investor Relations*

**AutoZone, Inc. (AZO)**June 13<sup>th</sup> – Participation Type TBA

- Management TBA

**Avolta, Formerly Dufry (AVOLTA)**June 12<sup>th</sup> & 13<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Yves Gerster – *Chief Financial Officer*
- Rebecca McClellan – *Head of Investor Relations*

**B&G Foods (BGS)**June 11<sup>th</sup> & 12<sup>th</sup> – 1x1 Meetings Only

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

**Bath and Body Works (BBWI)**June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Eva Boratto – *Chief Financial Officer*
- Julie Rosen – *President, Retail*

Bath&amp;BodyWorks

**BellRing Brands, Inc. (BRBR)**June 11<sup>th</sup> – 1x1 Meetings Only

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

**Best Buy Co., Inc. (BBY)**June 13<sup>th</sup> – 1x1 Meetings Only

- Corie Barry – *Chief Executive Officer*
- Matt Bilunas – *Chief Financial Officer*
- Mollie O'Brien – *Investor Relations*

**Birkenstock (BIRK)**June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Oliver Reichert – *Chief Executive Officer*
- Erik Massmann – *Chief Financial Officer*
- David Kahan – *President & Chief Executive Officer, Birkenstock Americas*
- Alexander Hoff – *SVP, Finance*
- Megan Kulick – *Director, Investor Relations*

**Campbell Soup Company (CPB)**June 13<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Mark Clouse – *President & Chief Executive Officer*
- Carrie Anderson – *Chief Financial Officer*
- Rebeca Gardy – *SVP, Chief Investor Relations Officer*

**Canada Goose Holdings, Inc. (GOOS)**June 13<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Beth Clymer – *President, Finance, Strategy, Administration & Operations*
- Ana Raman – *VP, Investor Relations*

**Carter's, Inc. (CRI)**June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Mike Casey – *Chairman & Chief Executive Officer*
- Richard Westenberger, *Chief Financial Officer & Chief Operating Officer*
- Kendra Krugman – *Chief Creative & Growth Officer*
- Sean McHugh – *VP & Treasurer*
- Marissa Griffin – *Sr. Analyst, Treasury & Investor Relations*

**Celsius (CELH)**June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- John Fieldly – *Chief Executive Officer*
- Jarrod Langhans – *Chief Financial Officer*
- Toby David – *Chief of Staff*
- Paul Wiseman – *SVP, Communications*

**Chewy (CHWY)**June 11<sup>th</sup> & 12<sup>th</sup> – 1x1 Meetings Only

- Sumit Singh – *Chief Executive Officer*
- David Reeder – *Chief Financial Officer*
- Jen Hsu – *Head of Investor Relations*
- Natalie Nowak – *Director, Investor Relations*

**Chipotle Mexican Grill, Inc. (CMG)**June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Brian Niccol – *Chairman & Chief Executive Officer*
- Jack Hartung – *Chief Financial & Administrative Officer*
- Cindy Olsen – *Head of Investor Relations & Strategy*



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## PARTICIPATING COMPANIES

**Circana, Formerly NPD Group (Private)** June 12<sup>th</sup> & 13<sup>th</sup> – Fireside Chat Only

- Don Unser – *President, Thought Leadership*
- Marshal Cohen – *Chief Retail Advisor*
- David Portalatin – *SVP & Industry Advisor, Food & Foodservice*

**Coca-Cola Europacific Partners (CCEP)** June 11<sup>th</sup> & 13<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Damian Gammell – *Chief Executive Officer*
- Sarah Willett – *VP, Investor Relations & Corporate Strategy*
- Raj Sidhu – *Associate Director, Investor Relations & Corporate Strategy*

**Coca-Cola FEMSA (KOFMX)** June 11<sup>th</sup> & 12<sup>th</sup> – 1x1 Meetings Only

- Jorge Collazo Pereda – *Director, Investor Relations*

**Coca-Cola HBC AG (CCH)** June 11<sup>th</sup> – 1x1 Meetings Only

- Joanna Kennedy – *Head of Investor Relations*

**Colgate-Palmolive Company (CL)** June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- John Faucher – *Chief Investor Relations Officer & EVP, M&A*

**Costco (COST)** June 13<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Gary Millerchip – *EVP & Chief Financial Officer*
- David Sherwood – *VP, Investor Relations*
- Josh Dahmen – *AVP, Investor Relations*

**Coty, Inc. (COTY)** June 13<sup>th</sup> – Fireside Chat Only

- Sue Nabi – *Chief Executive Officer*
- Laurent Mercier – *Chief Financial Officer*
- Anna von Bayern – *Chief Corporate Affairs Officer*
- Olga Levinzon – *SVP, Investor Relations & Head of M&A*
- Colleen Naber – *Senior Manager, Investor Relations*

**Five Below, Inc. (FIVE)** June 13<sup>th</sup> – 1x1 Meetings Only

- Kristy Chipman – *Chief Financial Officer*
- Christiane Pelz – *VP, Investor Relations & Treasury*

**Floor & Décor Holdings, Inc. (FND)** June 12<sup>th</sup> – 1x1 Meetings Only

- Bryan Langley – *EVP & Chief Financial Officer*
- Wayne Hood – *SVP, Investor Relations*
- Matt McConnell – *Senior Manager, Investor Relations*

**Genuine Parts Company (GPC)** June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Will Stengel – *President & Chief Executive Officer*
- Bert Nappier – *EVP & Chief Financial Officer*

**Hain Celestial Group, Inc. (HAIN)** June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Wendy Davidson – *President & Chief Executive Officer*
- Lee Boyce – *EVP & Chief Financial Officer*
- Curtiss Burce – *SVP, FP&A*
- Alexis Tessier – *VP, Investor Relations*

**Haverty (HVT)** June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Clarence Smith – *Chairman & Chief Executive Officer*
- Richard Hare – *EVP & Chief Financial Officer*
- Steve Burdette – *President*

**Heineken N.V. (HEIA)** June 11<sup>th</sup> – 1x1 Meetings Only

- Federico Castillo Martinez – *Head of Investor Relations*
- Mark Matthews – *Investor Relations Manager*

**Kellanova (K)** June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Steve Cahillane – *Chairman, President & Chief Executive Officer*
- John Renwick – *VP, Investor Relations & Corporate Planning*

**Kohl's Corporation (KSS)** June 12<sup>th</sup> – 1x1 Meetings Only

- Jill Timm – *Chief Financial Officer*
- Mark Rupe – *SVP, Investor Relations & Treasurer*

**Molson Coors (TAP)** June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Tracey Joubert – *Chief Financial Officer*
- Traci Mangini – *Director, Investor Relations*

**Mondelez International (MDLZ)** June 13<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Luca Zaramella – *EVP & Chief Financial Officer*
- Shep Dunlap – *SVP, Investor Relations*
- Philipp Roth – *Senior Director, Investor Relations*

**Nordstrom, Inc. (JWN)** June 11<sup>th</sup> – 1x1 Meetings Only

- Cathy Smith – *Chief Financial Officer*
- James Duies – *Head of Investor Relations*

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## PARTICIPATING COMPANIES

**Pernod Richard (PRNDY-OTCMKTS)**

Pernod Ricard

June 11<sup>th</sup> – Fireside Chat Only

- Alexandre Ricard – *Chairman & Chief Executive Officer*
- Florence Tresarrieu – *Global SVP, Investor Relations & Treasury*

**Philip Morris International (PM)**PHILIP MORRIS  
INTERNATIONALJune 11<sup>th</sup>, 12<sup>th</sup> & 13<sup>th</sup> – 1x1 Meetings Only

- Mariusz Jamka – *Investor Relations*

**Post Holdings (POST)**

POST HOLDINGS, INC.

June 11<sup>th</sup> – 1x1 Meetings Only

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

**Qurate (QRTEA)**June 11<sup>th</sup> & 12<sup>th</sup> – Fireside Chat Only

- David Rawlinson – *Chief Executive Officer*

**Restaurant Brands International (QSR)**June 13<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Patrick Doyle – *Executive Chairman*
- Josh Kobza – *Chief Executive Officer*
- Kendall Peck – *Head of Investor Relations*
- Valerie Macaulay – *Sr. Manager, Investor Relations*

**Revolve Group, Inc. (RVLV)**

REVOLVE

June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Michael Mente – *Co-Founder & Co-Chief Executive Officer*
- Jesse Timmermans – *Chief Financial Officer*
- Erik Randerson – *VP, Investor Relations*

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

SKECHERS

June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

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

**Tapestry (TPR)**

tapestry

June 11<sup>th</sup> – 1x1 Meetings Only

- Joanne Crevoiserat – *Chief Executive Officer*
- Scott Roe – *Chief Financial Officer & Chief Operating Officer*
- Christina Colone – *Global Head of Investor Relations*
- Kelsey Mueller – *Director, Investor Relations*
- Maddison Miller – *Senior Manager, Investor Relations*

**Target Corporation (TGT)**June 13<sup>th</sup> – 1x1 Meetings Only

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

**Texas Roadhouse, Inc. (TXRH)**June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Chris Colson, Name – *Chief Legal & Administrative Officer*
- Michael Bailen, *Head of Investor Relations*

**The Duckhorn Portfolio (NAPA)**June 12<sup>th</sup> & 13<sup>th</sup> – 1x1 Meetings Only

- Jennifer Fall Jung – *Chief Financial Officer*
- Sean Sullivan – *Chief Strategy & Legal Officer*
- Ben Avenia-Tapper – *Investor Relations*

**The Home Depot, Inc. (HD)**June 13<sup>th</sup> – 1x1 Meetings Only

- Isabel Janci – *VP, Investor Relations & Treasury*
- Jacob Ashcraft – *Director, Investor Relations*

**The Kraft Heinz Company (KHC)**

Kraft Heinz

June 13<sup>th</sup> – 1x1 Meetings Only

- Andre Maciel – *EVP & Global Chief Financial Officer*
- Anne-Marie Megela – *VP & Head of Global Investor Relations*

**The Sherwin-Williams Company (SHW)**June 13<sup>th</sup> – 1x1 Meetings Only

- Jim Jaye – *SVP, Investor Relations & Corporate Communications*
- Eric Swanson – *VP, Investor Relations*

**Victoria's Secret & Co. (VSCO)**

VICTORIA'S SECRET

June 11<sup>th</sup> – 1x1 Meetings Only

- Martin Waters – *Chief Executive Officer*
- Tim Johnson – *Chief Financial Officer & Chief Accounting Officer*
- Kevin Wynn – *VP, Investor Relations*

**Vita Coco (COCO)**June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Martin Roper – *Chief Executive Officer*
- Corey Baker – *Chief Financial Officer*

**Walmart, Inc. (WMT)**

Walmart

June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- John David Rainey – *EVP, Chief Financial Officer*
- Steph Wissink – *SVP, Head of Investor Relations*
- Kary Brunner – *Senior Director, Investor Relations*



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**Wayfair (W)**June 11<sup>th</sup> – 1x1 Meetings Only

- Ryan Barney – *Associate Director, Investor Relations*
- Nick Wiles – *Senior Manager, Investor Relations*

**Wendy's Company (WEN)**June 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

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

**Whirlpool Corporation (WHR)**June 12<sup>th</sup> – 1x1 Meetings and Panel

- Jim Peters – *EVP & Chief Financial Officer*
- Scott Cartwright – *Head of Investor Relations*
- Ashley Kovalcik – *Director, Finance & Investor Relations*

**Williams-Sonoma, Inc. (WSM)**June 11<sup>th</sup> – Fireside Chat Only

- Jeff Howie – *EVP & Chief Financial Officer*
- Jeremy Brooks – *Chief Accounting Officer & Head of Investor Relations*

**WK Kellogg (KLG)**June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Gary Pilnick – *Chief Executive Officer*
- David McKinstry – *Chief Financial Officer*
- Karen Duke – *VP, Finance Global Planning*
- Matthew Harrison, *Senior Director, Investor Relations*

**Xponential Fitness (XPOF)**June 11<sup>th</sup> & 12<sup>th</sup> – 1x1 Meetings and Fireside Chat

- John Meloun – *Chief Financial Officer*

**Yum! Brands, Inc. (YUM)**June 11<sup>th</sup> – 1x1 Meetings and Fireside Chat

- Chris Turner – *Chief Financial Officer*
- Matt Morris – *Senior Director, Investor Relations*
- Kaitlyn Yocom – *Manager, Investor Relations*

