

Software Bus Tour

JANUARY 5-8, 2026

AGENDA | SAN FRANCISCO BAY AREA, CA

TIME (PT) – MONDAY, JANUARY 5

9:00 AM	Bus Departure from 101 California Street (California St & Front Street)
10:00 AM – 11:00 AM	Guidewire (GWRE) – Jeff Cooper (CFO) and Alex Hughes (IR) – 970 Park Pl, Suite 200, San Mateo, CA 94403 (Conf Room: Learning Room)
11:00 AM – 12:00 PM	Unity Software Inc. (U) – Jarrod Yahes (CFO) and Alex Giaimo (IR) – Virtual from Guidewire's office, 970 Park Pl, Suite 200, San Mateo, CA 94403 (Conf Room: Learning Room)
1:00 PM – 2:00 PM	Notable Capital (Private) – Jeff Richards (Managing Partner) – Jefferies, 101 California Street, 31st Floor, San Francisco, CA , 94105
2:00 PM – 3:00 PM	Roper Technologies Inc. (ROP) – Neil Hunn (CEO) and Jason Conley (CFO) – Virtual from Office, 101 California Street, 31st Floor, San Francisco, CA 94111
3:00 PM – 4:00 PM	Sentinel One (S) – Tomer Weingarten (CEO) and Saad Nazir (IR) – Virtual from Office, 101 California Street, 31st Floor, San Francisco, CA 94111
4:00 PM – 5:00 PM	Canva (Private) – Ian Lee (SVP, Finance) – Jefferies, 101 California Street, 31st Floor, San Francisco, CA , 94105
5:00 PM – 8:00 PM	Evening Event – Studio Golf SF, Golf Simulators with Dinner & Drinks – 100 Mission St, San Francisco, CA 94105

TUESDAY, JANUARY 6

7:00 AM – 7:45 AM	Expert Session: Bill MacCartney, AI Predictions into 2026 – Virtual from Office, 101 California Street, 31st Floor, San Francisco, CA 94111
8:00 AM – 8:45 AM	Zoom Video Communications (ZM) – Charles Eveslage (Head of IR) and Carsten Beckwith (IR) – Jefferies, 101 California Street, 31st Floor, San Francisco, CA , 94105
9:00 AM	Bus Departure from 101 California Street (California St & Front Street)
9:30 AM – 10:30 AM	Salesforce (CRM) – Parker Harris (Co-Founder and CTO) – Salesforce Tower, 415 Mission Street, San Francisco, CA 94105
11:00 AM – 12:00 PM	Docusign (DOCU) – Allan Thygesen (CEO) and Matt Sonefeldt (IR) – 21 Main Street, Suite 800, San Francisco, CA 94105
1:00 PM – 2:00 PM	Okta (OKTA) – Eric Kelleher (President and COO) – 100 1st Street, San Francisco, CA 94105
2:15 PM – 3:15 PM	Asana (ASAN) – Sonalee Parekh (CFO) – 633 Folsom Street, Suite 100, San Francisco, CA 94107
3:30 PM – 4:30 PM	Samsara (IOT) – Dominic Phillips (CFO) and Mike Chang (VP, Corporate Development & IR) – 1 De Haro Street, San Francisco, CA 94107, USA
5:30 PM – 8:30 PM	Evening Event – Dinner at Wayfare Tavern – 201 Pine Street, San Francisco, CA 94105

WEDNESDAY, JANUARY 7

6:30 AM	Bus Departure from 101 California Street (California St & Front Street)
8:00 AM – 9:00 AM	Zscaler (ZS) – Kevin Rubin (CFO), Adam Gellar (CPO) and Kim Watkins (IR) – Marriott Courtyard, 111 Holger Way, San Jose, CA 95134
9:30 AM – 10:30 AM	Adobe (ADBE) – Ely Greenfield (SVP & CTO, Digital Media) – 333 West San Fernando Street, San Jose, CA 95113
11:30 AM – 12:30 PM	Snowflake (SNOW) – Brian Robins (CFO), Katherine McCracken (IR) – 135 Constitution Drive, Menlo Park, CA 94025
1:00 PM – 2:00 PM	Intuit (INTU) – Alex Balazs (CTO) – 2750 Coast Avenue, Building 6, Mountain View, CA 94043
3:30 PM – 4:30 PM	Autodesk (ADSK) – Janesh Moorjan (CFO) – The Landmark Building at One Market Street, Suite 400, San Francisco, CA 94105

THURSDAY, JANUARY 8

7:00 AM – 7:30 AM	Expert Session: Mary Jo Foley, MSFT & Cloud Expert – Virtual from Office, 101 California Street, 31st Floor, San Francisco, CA 94111
7:30 AM – 8:15 AM	SailPoint (SAIL) – Mark McClain (Founder & CEO), Brian Carolan (CFO) and Scott Schmitz (SVP IR) – Virtual from Office, 101 California Street, 31st Floor, San Francisco, CA 94111
8:15 AM – 9:15 AM	Aviatrix (Private) – Doug Merritt (CEO), Ken Tinsley (CFO) – Virtual from Office, 101 California Street, 31st Floor, San Francisco, CA 94111
9:15 AM	Bus Departure from 101 California Street (California St & Front Street)
9:45 AM – 10:45 AM	Elastic (ESTC) – Ashutosh Kulkarni (CEO), Navam Welihinda (CFO) and Eric Prengel (GVP Finance) – 88 Kearny Street, 19th Floor, San Francisco, CA 94108
11:00 AM – 12:00 PM	Sierra AI* (Private) Limited Capacity – Bret Taylor (CEO and Co-founder) – 235 2nd Street, Floor 2, San Francisco, CA 94108
12:30 PM – 1:30 PM	Databricks (Private) – Dave Conte (CFO) and David Meyer (SVP Product Management) – 160 Spear Street, 15th floor, San Francisco, CA 94105
2:45 PM – 3:45 PM	Workday (WDAY) – Carl Eschenbach (CEO) and Zane Rowe (CFO) – 6160 Stoneridge Mall Rd, Pleasanton, California (Conference Room 6160 139 Oprah Winfrey)