



Global Technology and AI Conference

Monday, December 1 - Thursday, December 4, 2025

The Phoenician

Scottsdale, AZ

*Please click here for a list of companies hosting one-on-one and group meetings.

Date: Tracks:

Monday, December 1, 2025

	Ballroom A	Estrella Ballroom
7:30 AM - 9:00 AM	Breakfast , East Lawn	
8:00 AM	Registration , East Foyer	
8:55 AM - 5:25 PM	Scheduled one-on-one and group meetings (boxed lunches available)	
10:55 AM - 11:25 AM	Data Centers: Powering the AI Boom - Powered by UBS-ARC David Mettler, <i>EVP T5 Operations</i> , T5 Data Centers	
11:30 AM - 1:30 PM	Lunch buffet , East Lawn <i>(Boxed lunches available on one-on-one floors)</i>	
11:35 AM - 12:05 PM	Building the AI World - Powered by UBS-ARC Sviat Dulianinov, <i>Intermin Chief Executive Officer</i> , Bright Machines Chandra Nath, <i>Chief Financial Officer</i> , DevRev	

Monday, December 1, 2025

Ballroom A		Estrella Ballroom
12:15 PM - 12:45 PM	Charles River Associates CRAI Paul Maleh, <i>President & CEO</i> Eric Nierenberg, <i>Chief Financial Officer</i>	Webtoon Entertainment Inc WBTN David Lee, <i>Chief Financial Officer & Chief Operating Officer</i>
12:55 PM - 1:25 PM	Infineon Technologies AG IFX Dr. Sven Schneider, <i>Chief Financial Officer</i>	Uniphore Umesh Sachdev, <i>CEO & Co-founder</i>
1:35 PM - 2:05 PM	RingCentral Inc RNG Vlad Shmunis, <i>Founder, Chairman and CEO</i> Vaibhav Agarwal, <i>Chief Financial Officer</i>	Varonis Systems Inc VRNS Guy Melamed, <i>Chief Financial Officer, Chief Operating Officer</i> Brian Vecci, <i>Field Chief Technology Officer</i>
2:15 PM - 2:45 PM	DigitalOcean Holdings Inc DOCN Paddy Srinivasan, <i>Chief Executive Officer</i> Matt Steinfort, <i>Chief Financial Officer</i>	Ping Identity Holding Corp Raj Dani, <i>Chief Financial Officer</i>
2:55 PM - 3:25 PM	Quantum Computing Panel Dr. Chris Monroe, <i>Co-Founder & Chief Scientific Advisor, IonQ Inc</i> Dr. Jan Goetz, <i>Co-founder & Co-CEO, IQM</i> David Rivas, <i>Chief Technology Officer, Rigetti</i> Yuping Huang, <i>Chairman of the Board and Chief Executive Officer, Quantum Computing Inc</i>	1Password David Faugno, <i>Chief Executive Officer</i> Greg Henry, <i>Chief Financial Officer</i>
3:35 PM - 4:05 PM	Fiserv Inc FISV Mike Lyons, <i>Chief Executive Officer</i> Paul Todd, <i>Chief Financial Officer</i>	Zebra Technologies ZBRA Nathan Winters, <i>Chief Financial Officer</i>
4:15 PM - 4:45 PM	Seagate Technology Holdings STX Gianluca Romano, <i>Chief Financial Officer</i>	Poolside AI Margarida Garcia, <i>Chief Operating Officer</i>
4:55 PM - 5:25 PM	Motorola Solutions Inc MSI Jason Winkler, <i>EVP & Chief Financial Officer</i>	
5:00 PM - 6:15 PM	Cocktail reception, Ballroom E Transitioning to a Robotic World - Powered by UBS-ARC	

Monday, December 1, 2025

	Ballroom A	Estrella Ballroom
	<p>Chris Walti, <i>Co-founder & Chief Executive Officer, Mytra</i> Mustally Hussain, <i>Chief Financial Officer, 1x Technologies</i></p> <p><i>*Registration required</i></p>	
5:30 PM - 6:30 PM	Welcome reception , Thirsty Camel, Lobby Bar	
6:30 PM	Company hosted dinners (<i>consult schedule for allocation; start time will vary</i>)	
8:00 PM - 10:00 PM	After dinner drinks , Thirsty Camel, Lobby Bar	

Tuesday, December 2, 2025

	Ballroom D	Ballroom A	Ballroom G	Ballroom F	Ballroom E	Estrella Ballroom
6:30 AM	Registration , East Foyer					
7:00 AM - 8:30 AM	Breakfast , East Lawn					
7:20 AM	<p>Opening Remarks (Ballroom D) UBS, Marco Valla, Co-President of the Investment Bank and Head of Global Banking</p>					
7:35 AM - 5:25 PM	Scheduled one-on-one and group meetings					
7:35 AM - 8:05 AM	<p>Keynote: NVIDIA Corp NVDA Colette Kress, <i>EVP & Chief Financial Officer</i></p>					

Tuesday, December 2, 2025

	Ballroom D	Ballroom A	Ballroom G	Ballroom F	Ballroom E	Estrella Ballroom
8:15 AM - 8:45 AM	Keynote: Mastercard Inc MA Craig Vosburg, <i>Chief Services Officer</i>		NXP Semiconductors NV NXPI Bill Betz, <i>Chief Financial Officer</i> Rafael Sotomayor, <i>Chief Executive Officer</i>	Gen Digital Inc GEN Vincent Pilette, <i>Chief Executive Officer</i> Natalie Derse, <i>Chief Financial Officer</i>	Lightmatter Nicholas Harris, <i>Founder & Chief Executive Officer</i> Simona Jankowski, <i>Chief Financial Officer</i>	
8:55 AM - 9:25 AM	Keynote: Visa Inc V Oliver Jenkyn, <i>Group President, Global Markets</i>	Keynote: Applied Materials Inc AMAT Brice Hill, <i>SVP & Chief Financial Officer</i>	UBS IT Executives Zoe Evans, <i>Managing Director, Head of IB & NCL Technology and GOTO UK</i> Heather Beckman, <i>Managing Director, Head of Wealth Management Americas Technology and Global Ops & Technical Office Americas</i>	JFrog Ltd FROG Ed Grabscheid, <i>Chief Financial Officer</i> Jeffrey Schreiner, <i>VP, Investor Relations</i>	Element Solutions Inc ESI Ben Gliklich, <i>Chief Executive Officer</i> Varun Gokarn, <i>VP Strategy & Integration</i>	MSCI Inc MSCI Andy Wiechmann, <i>Chief Financial Officer</i>
9:35 AM - 10:05 AM	Keynote: SAP SE SAP Christian Klein, <i>Chief Executive Officer</i>	Autodesk Inc ADSK Andrew Anagnost, <i>President & Chief Executive Officer</i> Janesh Moorjani, <i>Chief Financial Officer</i>	onsemi ON Hassane El-Khoury, <i>President, Chief Executive Officer</i> Thad Trent, <i>EVP, Chief Financial Officer</i>	Zoom Communications Inc ZM Michelle Chang, <i>Chief Financial Officer</i>	Zillow Group Inc ZG Jeremy Hofmann, <i>Chief Financial Officer</i>	Amkor Technology Inc AMKR Kevin Engel, <i>Chief Operating Officer</i> Megan Faust, <i>Chief Financial Officer and Treasurer</i>

Tuesday, December 2, 2025

	Ballroom D	Ballroom A	Ballroom G	Ballroom F	Ballroom E	Estrella Ballroom
10:15 AM - 10:45 AM	Keynote: Anthropic Krishna Rao, <i>Chief Financial Officer</i>	Analog Devices Inc ADI Rich Puccio, <i>Chief Financial Officer</i>	Zscaler Inc ZS Jay Chaudhry, <i>Chief Executive Officer</i>	Arista Networks Inc ANET Chantelle Breithaupt, <i>Chief Financial Officer</i>	Fidelity National Information Services FIS Stephanie Ferris, <i>President & Chief Executive Officer</i> James Kehoe, <i>Chief Financial Officer</i> Georgios Mihalos, <i>SVP Investor Relations</i>	
10:55 AM - 11:25 AM	Keynote: Lam Research Corp LRCX Tim Archer, <i>President & Chief Executive Officer</i> Doug Bettinger, <i>EVP & Chief Financial Officer</i>	Keynote: Applovin Corp APP Adam Foroughi, <i>Chief Executive Officer</i> Matt Stumpf, <i>Chief Financial Officer</i>	Pegasystems Inc PEGA Ken Stillwell, <i>Chief Financial Officer & Chief Operating Officer</i>	Cisco Systems Inc CSCO Bill Gartner, <i>SVP & GM Optical Systems & Optics Group</i> Sami Badri, <i>Head of Investor Relations & Market Insights</i>	Keynote: Block Inc XYZ Owen Jennings, <i>Block Business Lead</i>	Nasdaq Inc NDAQ Sarah Youngwood, <i>Chief Financial Officer</i>
11:30 AM - 1:30 PM	Lunch buffet , East Lawn <i>(Boxed lunches available on one-on-one floors)</i>					
11:35 AM - 12:05 PM	Keynote: Texas Instruments Inc TXN Haviv Ilan, <i>President & Chief Executive Officer</i>	Keynote: Intuit Inc INTU Sasan Goodarzi, <i>Chief Executive Officer</i> Kim Watkins, <i>VP, Investor Relations</i>	Darktrace Ltd Suman Raju, <i>Chief Financial Officer</i> Phil Pearson, <i>Head of Corporate Strategy & Development</i>	Dell Technologies Inc DELL Jeff Clarke, <i>Vice Chairman and Chief Operating Officer</i>	Global Payments Inc GPN Cameron Bready, <i>Chief Executive Officer</i>	Nordic Semiconductor ASA NOD Vegard Wollan, <i>Chief Executive Officer</i>

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12:15 PM - 12:45 PM	Keynote: Palo Alto Networks Inc PANW Nikesh Arora, <i>Chairman & Chief Executive Officer</i>	Globalfoundries Inc GFS Tim Breen, <i>Chief Executive Officer</i> Sam Franklin, <i>Interim Chief Financial Officer</i>	Datadog Inc DDOG David Obstler, <i>Chief Financial Officer</i>	GetYourGuide Nils Chrestin, <i>Chief Financial Officer</i>	Marqeta Inc MQ Mike Milotich, <i>Chief Executive Officer & Chief Financial Officer</i>	Alight Inc ALIT Jeremy Heaton, <i>Chief Financial Officer</i> Jeremy Cohen, <i>Vice President, Investor Relations</i>
12:55 PM - 1:25 PM	Keynote: Databricks Ali Ghodsi, <i>Chief Executive Officer</i> Dave Conte, <i>Chief Financial Officer</i>	Western Digital Corp WDC Irving Tan, <i>Chief Executive Officer</i> Kris Sennesael, <i>Chief Financial Officer</i>	Nice Ltd NICE Beth Gaspich, <i>Chief Financial Officer</i> Ryan Gilligan, <i>VP of IR</i>	AvePoint Inc AVPT TJ Jiang, <i>Co-Founder & Chief Executive Officer</i> Jim Caci, <i>Chief Financial Officer</i> Mario Carvajal, <i>Chief Strategy Officer & Chief Marketing Officer</i>		Intercontinental Exchange ICE Benjamin Jackson, <i>President, Intercontinental Exchange</i> Warren Gardiner, <i>Chief Financial Officer</i>
1:35 PM - 2:05 PM	Keynote: HubSpot Inc HUBS Yamini Rangan, <i>Chief Executive Officer</i>	Dynatrace Inc DT Rick McConnell, <i>Chief Executive Officer</i> Jim Benson, <i>Chief Financial Officer</i>	SiTime Corp SITM Rajesh Vashist, <i>Chief Executive Officer</i> Beth Howe, <i>Chief Financial Officer</i>	Verra Mobility Corp VRRM David Roberts, <i>President & Chief Executive Officer</i> Craig Conti, <i>Chief Financial Officer</i>	Corpay Inc CPAY James Englander, <i>SVP, Investor Relations</i>	Intapp Inc INTA John Hall, <i>Chairman and Chief Executive Officer</i> Thad Jampol, <i>Co-Founder and Chief Product Officer</i>
2:15 PM - 2:45 PM	Skyworks Solutions Inc SWKS Phil Brace, <i>Chief Executive Officer</i>	ASM International NV ASM Hichem M'Saad, <i>Chief Executive Officer</i> Paul Verhagen, <i>Chief Financial Officer</i>	Open Text Corp OTEX Tom Jenkins, <i>Executive Chair & Chief Strategy Officer</i>	Qualys Inc QLYS Sumedh Thakar, <i>President and Chief Executive Officer</i> Joo Mi Kim, <i>Chief Financial Officer</i>	Western Union Co WU Matt Cagwin, <i>Chief Financial Officer</i> Tom Hadley, <i>Head of Corporate Development</i>	Cadence Design Systems Inc CDNS Anirudh Devgan, <i>Chief Executive Officer</i>

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2:55 PM - 3:25 PM	Keynote: Qualcomm Inc QCOM Cristiano Amon, <i>President & Chief Executive Officer</i>		Tenable Holdings Inc TENB Matt Brown, <i>Chief Financial Officer</i> Erin Karney, <i>VP, Investor Relations</i>		Affirm Holdings Inc AFRM Michael Linford, <i>Chief Operating Officer</i>	Logitech International SA LOGN Hanneke Faber, <i>Chief Executive Officer</i>
3:35 PM - 4:05 PM	Keynote: Microsoft Corp MSFT Rajesh Jha, <i>EVP, Experiences + Devices</i>	NetApp Inc NTAP George Kurian, <i>Chief Executive Officer</i>	Teradyne Inc. Gregory Smith, <i>President & Chief Executive Officer</i>	Verisk Analytics Inc VRSK Elizabeth Mann, <i>Chief Financial Officer</i>	Wex Inc WEX Melissa Smith, <i>Chair, Chief Executive Officer & President</i>	Clearwater Analytics Holdings Inc CWAN Jim Cox, <i>Chief Financial Officer</i> Kamil Mielczarek, <i>Head of Investor Relations</i>
4:15 PM - 4:45 PM	Sandisk (Dinner Mon) SNDK David Goeckeler, <i>Chief Executive Officer</i> Luis Visoso, <i>Chief Financial Officer</i>	The Software Investment Landscape: A Discussion with Thoma Bravo Mike Hoffmann, <i>Partner</i>	Five9 Inc FIVN Mike Burkland, <i>Chief Executive Officer</i> Bryan Lee, <i>Chief Financial Officer</i>	Par Technology Corp PAR Savneet Singh, <i>Chief Executive Officer</i>	Wix.com Ltd WIX Lior Shemesh, <i>Chief Financial Officer</i> Avi Stern, <i>VP of Finance</i> Emily Liu, <i>Head of Investor Relations</i>	Cellebrite DI Ltd CLBT Thomas Hogan, <i>Chief Executive Officer</i> David Barter, <i>Chief Financial Officer</i>
4:55 PM - 5:25 PM		Celestica Inc CLS Mandeep Chawla, <i>Chief Financial Officer</i> Indjot Sandhar, <i>Manager, Investor Relations and Corporate Development</i> Matthew Pallotta,	Ambarella Inc AMBA Fermi Wang, <i>Chief Executive Officer</i>	Powering AI Ramsey Hamady, <i>Chief Financial Officer</i> , NuScale Power Corp Steven Hellman, <i>EVP & Chief Financial Officer</i> , TerraPower	Wise plc WISE Harsh Sinha, <i>Chief Technology Officer</i>	Kioxia Holdings Corp 285A Stacy Smith, <i>Executive Chairman</i>

Tuesday, December 2, 2025

	Ballroom D	Ballroom A	Ballroom G	Ballroom F	Ballroom E	Estrella Ballroom
		<i>Senior Director, Head of Investor Relations</i>				
5:30 PM - 6:30 PM	Reception , Thirsty Camel, Lobby Bar					
5:30 PM - 6:30 PM	Corporate to corporate reception , Tea Room and Terrace					
6:30 PM	Company hosted dinners (<i>consult schedule for allocation; start time will vary</i>)					
8:00 PM - 10:00 PM	After dinner drinks , Thirsty Camel, Lobby Bar					

Wednesday, December 3, 2025

	Ballroom D	Ballroom A	Ballroom G	Ballroom F	Ballroom E
7:00 AM	Registration , East Foyer				
7:00 AM - 8:30 AM	Breakfast , East Lawn				
7:35 AM - 5:25 PM	Scheduled one-on-one and group meetings				
7:35 AM - 8:05 AM	Keynote: CrowdStrike Holdings Inc CRWD <i>George Kurtz, Co-Founder, Chief Executive Officer</i>	Global-E Online Ltd GLBE <i>Amir Schlachet, Chief Executive Officer</i> <i>Ofer Koren, Chief Financial Officer</i>	Ziff Davis Inc ZD <i>Bret Richter, Chief Financial Officer</i>	Flywire Corp FLYW <i>Cosmin Pitigoi, Chief Financial Officer</i> <i>Masha kahn, VP Investor Relations</i>	

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	Ballroom D	Ballroom A	Ballroom G	Ballroom F	Ballroom E
8:15 AM - 8:45 AM	Keynote: Advanced Micro Devices Inc AMD Lisa Su, <i>Chair & Chief Executive Officer</i>	Keynote: PayPal Holdings Inc PYPL Jamie Miller, <i>Chief Financial & Operating Officer</i>	MongoDB Inc MDB Cj Desai, <i>President and Chief Executive Officer</i> Mike Berry, <i>Chief Financial Officer</i> Ben Cefalo, <i>SVP of Core Products</i>	Tyler Technologies Inc TYL Brian Miller, <i>EVP & Chief Financial Officer</i>	D-Wave Quantum Inc (Dinner Tues) QBTS Alan Baratz, <i>Chief Executive Officer</i> John Markovich, <i>Chief Financial Officer</i>
8:55 AM - 9:25 AM	Keynote: Uber Technologies Inc UBER Prashanth Mahendra-Rajah, <i>Chief Financial Officer</i>	Toast Inc TOST Elena Gomez, <i>President & Chief Financial Officer</i>	HP Inc (Dinner Tues) HPQ Karen Parkhill, <i>Chief Financial Officer</i>	ASML Holding NV ASML Jim Kavanagh, <i>Head of Investor Relations</i>	Nebius Group NV NBIS Marc Boroditsky, <i>Chief Revenue Officer</i> Neil Doshi, <i>VP of Investor Relations</i>
9:35 AM - 10:05 AM	Keynote: IBM IBM Dinesh Nirmal, <i>SVP, Products, IBM Software</i>	Building AI Infrastructure Panel Chase Lochmiller, <i>Co-Founder & Chief Executive Officer, Crusoe</i> Michael McNamara, <i>Chief Executive Officer, Lancium</i>	Nokia NOKIA Justin Hotard, <i>President & Chief Executive Officer</i> David Mulholland, <i>Head of Investor Relations</i>	Shopify Inc SHOP Carrie Gillard, <i>Director, Investor Relations</i>	SS&C Technologies Holdings Inc SSNC Bill Stone, <i>CEO</i>
10:15 AM - 10:45 AM	Keynote: ServiceNow Inc NOW Amit Zavery, <i>President, Chief Product Officer & Chief Operating Officer</i>	KLA Corporation KLAC Bren Higgins, <i>EVP & Chief Financial Officer</i>	McGraw Hill MH Bob Sallmann, <i>Chief Financial Officer</i> Danielle Kloeblen, <i>SVP IR & Treasurer</i>	Payoneer Global Inc PAYO Bea Ordonez, <i>Chief Financial Officer</i>	Coherent Corp COHR Jim Anderson, <i>Chief Executive Officer</i> Sherri Luther, <i>Chief Financial Officer</i> Julie Sheridan Eng, <i>Chief Technology Officer</i>

Wednesday, December 3, 2025

	Ballroom D	Ballroom A	Ballroom G	Ballroom F	Ballroom E
10:55 AM - 11:25 AM	Keynote: Coreweave Inc CRWV Nick Robbins, <i>VP, Corporate Development</i>	A Customer View on AI: C.H. Robinson Worldwide Inc CHRW Dave Bozeman, <i>President & Chief Executive Officer</i> Damon Lee, <i>Chief Financial Officer</i> Arun Rajan, <i>Chief Strategy & Innovation Officer</i>	BILL Holdings Inc BILL Rohini Jain, <i>Chief Financial Officer</i> John Rettig, <i>President & Chief Operating Officer</i>	Fastly Inc FSLY Kip Compton, <i>Chief Executive Officer</i> Richard Wong, <i>Chief Financial Officer</i>	Life360 Inc 360 Russell Burke, <i>Chief Financial Officer</i>
11:30 AM - 1:30 PM	Lunch buffet , East Lawn <i>(Boxed lunches available on one-on-one floors)</i>				
11:35 AM - 12:05 PM	ARM Holdings Plc ARM Jason Child, <i>EVP, Chief Financial Officer</i>	A Customer View on AI: The Coca-Cola Company KO Pratik Thakar, <i>Vice President, Generative AI</i>	ZoomInfo Technologies Inc GTM Henry Schuck, <i>Founder & Chief Executive Officer</i> Graham O'Brien, <i>Chief Financial Officer</i>	Sanmina Corp SANM Jure Sola, <i>Chairman of the Board, Chief Executive Officer</i>	Viant Technology Inc DSP Tim Vanderhook, <i>Co-Founder & Chief Executive Officer</i> Chris Vanderhook, <i>Co-Founder & Chief Operating Officer</i> Larry Madden, <i>Chief Financial Officer</i>
12:15 PM - 12:45 PM	A Customer View on AI: Walmart Inc WMT Seth Dallaire, <i>Walmart U.S. EVP, Chief Growth Officer</i>	Keysight Technologies Inc KEYS Satish Dhanasekaran, <i>President & Chief Executive Officer</i> Neil Dougherty, <i>Chief Financial Officer</i>	Shift4 Payments Inc FOUR Christopher N Cruz, <i>Chief Financial Officer</i>	Bloom Energy Corp BE KR Sridhar, PhD, <i>Founder & Chairman, Chief Executive Officer</i>	ACM Research Inc ACMR Mark McKechnie, <i>Chief Financial Officer</i>

Wednesday, December 3, 2025

	Ballroom D	Ballroom A	Ballroom G	Ballroom F	Ballroom E
12:55 PM - 1:25 PM	Microchip Technology Inc MCHP Steve Sanghi, <i>Chief Executive Officer</i> Eric Bjornholt, <i>SVP & Chief Financial Officer</i>	Financing the AI Buildout Kurt Tenenbaum, <i>Senior Managing Director, Blue Owl Capital Inc (OWL)</i> Neil Tiwari, <i>Managing Director, Ventures, Magnetar</i>	Chime Financial Inc CHYM Matthew Newcomb, <i>Chief Financial Officer</i>		Rocket Companies Inc RKT Brian Brown, <i>Chief Financial Officer & Treasurer</i>
1:35 PM - 2:05 PM	Keynote: Taiwan Semiconductor Manufacturing Co Ltd 2330 Wendell Huang, <i>Chief Financial Officer</i>	Commvault Systems Inc CVLT Jen DiRico, <i>Chief Financial Officer</i>	SoFi Technologies Inc SOFI Chris Lapointe, <i>Chief Financial Officer</i> Michael Ioanilli, <i>Head of Investor Relations</i> Michael Del Grosso, <i>Investor Relations</i>	Proofpoint Inc Remi Thomas, <i>Chief Financial Officer</i>	Power Distribution & the Grid: A Discussion with Alliant & Southern Co Antonio Smyth, <i>Executive Vice President-Power Generation and Gas Strategy, Alliant Energy Corp</i> Aaron Mitchell, <i>SVP of Strategic Growth, Southern Co</i>
2:15 PM - 2:45 PM	Intel Corp INTC John Pitzer, <i>CVP Global Treasury and Investor Relations</i>	Check Point Software Technologies CHKP Roei Golan, <i>Chief Financial Officer</i>	Euronet Worldwide Inc EEFT Mike Brown, <i>CEO & Chairman of the Board</i>	Twilio Inc TWLO Andy O'Dower, <i>VP, Product (Voice and Video)</i>	Ziprecruiter Inc ZIP Tim Yarbrough, <i>Chief Financial Officer</i>
2:55 PM - 3:25 PM	Formfactor Inc FORM Mike Slessor, <i>President & Chief Executive Officer</i> Aric McKinnis, <i>Chief Financial Officer</i>	Teradata Corp TDC John Ederer, <i>Chief Financial Officer</i>	Asana Inc ASAN Sonalee Parekh, <i>Chief Financial Officer</i>	Fermi Inc FRMI Toby Neugebauer, <i>Chief Executive Officer</i>	Upwork Inc UPWK Erica Gessert, <i>Chief Financial Officer</i>

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3:35 PM - 4:05 PM	Lumentum Holdings Inc LITE Michael Hurlston, <i>President & Chief Executive Officer</i>	Silicon Motion Technology Wallace Kou, <i>President & Chief Executive Officer</i> Jason Tsai, <i>Chief Financial Officer</i>	Impinj Inc PI Cary Baker, <i>Chief Financial Officer</i>	AI Goes to Hollywood: A Discussion with the Mediator Bryn Mooser, <i>Co-Founder, Asteria Film</i> Sean Bailey, <i>Founder, B5 Studios</i> Doug Shapiro, <i>Founder, The Mediator</i>	Ibotta IBTA Luke Swanson, <i>Chief Technology Officer</i> Shalin Patel, <i>VP, Investor Relations</i>
4:15 PM - 4:45 PM	Amplitude Inc AMPL Andrew Casey, <i>Chief Financial Officer</i>	GrubMarket Mike Xu, <i>Chief Executive Officer</i> Kathy Xu, <i>Chief Financial Officer</i>	Jack Henry & Associates JKHY Greg Adelson, <i>President & Chief Executive Officer</i> Mimi Carsley, <i>Chief Financial Officer & Treasurer</i>	Ambiq AMBQ Scott Hanson, <i>Founder & Chief Technology Officer</i> Humi Esaka, <i>Chief Executive Officer</i>	Karooooo Ltd KARO Richard Schubert, <i>Chief Operating Officer</i> Paul Bieber, <i>Vice President, Investor Relations & Strategic Finance</i>
4:55 PM - 5:25 PM	Ams-Osram AG AMS Rainer Irle, <i>Chief Financial Officer</i>	Semtech Corp SMTC Hong Hou, <i>Chief Executive Officer</i> Mark Lin, <i>Chief Financial Officer</i>	Automation Anywhere Aisera Vikram Khosla, <i>Chief Financial Officer, Automation Anywhere</i> Ben Lu, <i>Chief Financial Officer, Aisera</i>	Yanolja Jeff Kim, <i>Chief Executive Officer</i> Alex Ibrahim, <i>Chief Financial Officer</i> Alexander Hagens, <i>Head of Investor Relations</i>	
5:30 PM - 6:30 PM	Reception , Thirsty Camel, Lobby Bar				
6:30 PM	Company hosted dinners (<i>consult schedule for allocation; start time will vary</i>)				
8:00 PM - 10:00 PM	After dinner drinks , Thirsty Camel, Lobby Bar				

Thursday, December 4, 2025

Ballroom A	
7:00 AM	Registration , East Foyer
7:00 AM - 9:00 AM	Breakfast , Camelback Foyer
7:35 AM - 1:25 PM	Scheduled one-on-one and group meetings
8:15 AM - 8:45 AM	Keynote: Snowflake Inc SNOW Sridhar Ramaswamy, <i>Chief Executive Officer</i> Brian Robins, <i>Chief Financial Officer</i>
8:55 AM - 9:25 AM	Pure Storage Inc PSTG Rob Lee, <i>Chief Technology Officer</i>
9:35 AM - 10:05 AM	Flex Ltd FLEX Kevin Krumm, <i>Chief Financial Officer</i> Michael Hartung, <i>Chief Commercial Officer</i> Suzannah Williams, <i>Director, Investor Relations</i>
10:15 AM - 10:45 AM	GitLab Inc GTLB Bill Staples, <i>Chief Executive Officer</i> James Shen, <i>Interim CFO</i>
11:30 AM - 1:00 PM	Boxed lunches , Camelback Foyer (<i>Boxed lunches available on one-on-one floors</i>)