



AGENDA

- 8:20 A.M. *Registration and continental breakfast*
- 9:00 *Welcome!*
- 9:05 DAVID EINHORN, “Jelly-donut monetary policy, part II:
 Navigating by the stars under a cloudy sky”
- 9:55 DAVID DREDGE, “Compounding, imbalances and
 the arrow of time”
- 10:40 *Mix & mingle*
- 10:55 JEFFREY GUNDLACH, “Rates can never rise”
- 11:40 MICHAEL HARTNETT, “No, Mr. Bond, I expect you to die”
- 12:25 P.M. *Luncheon*
- 1:40 DAVID ABRAMS in conversation with JAMES GRANT:
 “Today’s excess is the nursery of tomorrow’s opportunity”
- 2:35 MITCH CANTOR, “Successful investing is about having everyone
 agree with you—later”
- 3:20 *Mix & mingle, part II*
- 3:35 HARLEY BASSMAN: “Dangerous curves ahead”
- 4:20 PAUL SINGER, “Reminiscences of a hedged investor”
- 5:00 *Cocktails with Toby Williams and her orchestra*