

## 26TH ANNUAL "NEW IDEAS" SUMMER CONFERENCE

METROPOLIS COUNTRY CLUB, 289 DOBBS FERRY RD (RTE 100B), WHITE PLAINS, NY 10607

| Room               | Callaway  | Ping   | Titleist  | Hogan   |  |  |
|--------------------|---|--|---|---|--|--|
| <b>Time</b>        |   |  |   |   |  |  |
| <b>7:15 a.m.</b>   | <b>Registration/Breakfast</b>   |  |   |   |  |  |
| <b>8:00-8:35</b>   | <b>UFP Technologies (UFPT)</b><br>Mitchell Rock, President<br>Ron Lataille, CFO   | <b>Janus International (JBI)</b><br>Anselm Wong, EVP & CFO<br>Terry Bagley, Pres. – Ind & Ptr Relationships<br>Sara Macioch, Senior Director, IR   | <b>Astronics (ATRO)</b><br>Peter Gundermann, President & CEO<br>Nancy Hedges, CFO   | <b>Federal Signal (FSS)</b><br>Jennifer Sherman, President & CEO<br>Ian Hudson, SVP & CFO<br>Felix Boesch, VP Corporate Strategy & IR           | <p><b>Companies Available for 1x1s Only</b></p> <p>—</p> <p><b>Compass Diversified</b><br/>(CODI)</p> <p><b>Crane Company</b><br/>(CR)</p> <p><b>Element Solutions</b><br/>(ESI)</p> <p><b>Griffon</b><br/>(GFF)</p> <p><b>Hillman Solutions</b><br/>(HLMN)</p> <p><b>Minerals Technologies</b><br/>(MTX)</p> <p><b>Rogers Corp</b><br/>(ROG)</p> <p><b>Varex Imaging</b><br/>(VREX)</p> |  |
| <b>8:40-9:15</b>   | <b>TIC Solutions (TIC)</b><br>Ben Heraud, CEO<br>Kristin Schultes, CFO<br>Andrew Shen, Director, IR                                 | <b>Spectrum Brands (SPB)</b><br>Faisal Qadir, EVP & CFO<br>Jennifer Schultz, Investor Relations  | <b>ESCO Technologies (ESE)</b><br>Bryan Saylor, President & CEO<br>Chris Tucker, SVP & CFO<br>Kate Lowrey, Director IR                        | <b>Clean Harbors (CLH)</b><br>Eric Dugas, EVP & CFO<br>William McKim, EVP Bulk Products & Svcs<br>Jim Buckley, SVP Investor Relations           |  |  |
| <b>9:20-9:55</b>   | <b>Gibraltar Industries, Inc. (ROCK)</b><br>Bill Bosway, President & CEO<br>Joe Lovechio, CFO<br>John Krause, CEO Building Products | <b>Helen of Troy (HELE)</b><br>Scott Uzzell, CEO<br>Brian Grass, CFO<br>Chris Robertson, SVP, Head of Corp Dev<br>Anne Rakunas, Investor Relations | <b>Primoris (PRIM)</b><br>Koti Vadlamudi, President & CEO<br>Ken Dodgen, EVP & CFO<br>Blake Holcomb, VP Investor Relations                    | <b>MAXIMUS Inc. (MMS)</b><br>David Mutrin, CFO<br>James Francis VP Investor Relations   |  |  |
| <b>10:00</b>       | <b>Break</b>  |  |   |   |  |  |
| <b>10:10-10:45</b> | <b>Cavco Industries (CVCO)</b><br>Bill Boor, President & CEO<br>Allison Aden, EVP & CFO<br>Mark Fusler, Director Investor Relations | <b>Crane NXT (CXT)</b><br>Aaron Saak, President & CEO<br>Christina Cristiano, SVP & CFO<br>Matt Roache, VP Investor Relations                      | <b>APi Group (APG)</b><br>David Jackola, CFO<br>Adam Walters, IR  | <b>OSI Systems (OSIS)</b><br>Alan Edrick, CFO<br>Ajay Vashishat, VP Business Development  |  |  |
| <b>10:50-11:25</b> | <b>LCI Industries (LCII)</b><br>Lillian Etkorn, EVP & CFO   | <b>Middleby Food Processing (MFP)</b><br>Mark Salman, CEO<br>Amy Campbell, CFO   | <b>Gentherm (THRM)</b><br>Bill Presley, President & CEO<br>Jon Douyard, EVP & CFO   | <b>Donnelley Financial Solutions (DFIN)</b><br>Dan Leib, President & CEO<br>Dave Gardella, EVP & CFO<br>Mike Zhao, Head of Investor Relations   |  |  |
| <b>11:30-12:30</b> | <b>Buffet Lunch</b>   |  |   |   |  |  |
| <b>12:35-1:10</b>  | <b>Patrick Industries (PATK)</b><br>Andy Nemeth, Chairman & CEO<br>Matt Filer, CFO<br>Steve O'Hara, VP Investor Relations           | <b>Balchem (BCPC)</b><br>Ted Harris, Chairman, President & CEO<br>Martin Bengtsson, EVP & CFO<br>Allison Baurichter, Sr. Director Corp. Finance    | <b>Standex (SXI)</b><br>David Dunbar, President & CEO<br>Vineet Kshirsagar, Chief Strategy Officer<br>Chris Howe, Director Investor Relations | <b>CSW Industrials (CSW)</b><br>Joe Armes, President & CEO<br>James Perry, EVP & CFO<br>Alexa Huerta, VP Investor Relations                     |  |  |
| <b>1:15-1:50</b>   | <b>Materion (MTRN)</b><br>Jugal Vijayvargiya, President & CEO<br>Shelly Chadwick, CFO<br>Kyle Kelleher, Manager IR                  | <b>Perimeter Solutions (PRM)</b><br>Kyle Sable, CFO<br>Seth Barker, VP FP&A & IR   | <b>Bioventus (BVS)</b><br>Robert Claypoole, President & CEO<br>David Crawford, VP Investor Relations  | <b>TETRA Technologies (TTI)</b><br>Brady Murphy, President & CEO<br>Kurt Hallead, Treasurer & Investor Relations                                |  |  |
| <b>2:00-2:35</b>   | <b>McGrath RentCorp (MGRC)</b><br>Philip Hawkins, President & CEO<br>Keith Prat, EVP & CFO<br>TJ Wang, Investor Relations           | <b>Novanta Inc. (NOVT)</b><br>Chuck Ravetto, Co-COO<br>Ray Nash, VP, Corporate Finance   | <b>Sensient Technologies (SXT)</b><br>Paul Manning, President & CEO<br>Tobin Tornehl, CFO<br>David Plautz, VP Investor Relations              | <b>Live Oak Acquisition Corp (LOKV)</b><br>Adam Fishman, CFO LOKV<br>Brian Gaebe, CFO Teamshares  |  |  |
| <b>2:40-3:15</b>   | <b>Lindsay Corp (LNN)</b><br>Randy Wood, President & CEO<br>Sam Hinrichsen, SVP & CFO   | <b>Columbus McKinnon (CMCO)</b><br>David Wilson, President & CEO<br>Greg Rustowicz, EVP & CFO<br>Kristy Moser, VP Investor Relations               | <b>Argan (AGX)</b><br>Josh Baugher, CFO   | <b>John Wiley &amp; Sons (WLY)</b><br>Matt Kissner, President & CEO<br>Craig Albright, EVP & CFO<br>Brian Campbell, Director Investor Relations |  |  |
| <b>3:20-3:55</b>   |   | <b>Enerpac Tool Group (EPAC)</b><br>Paul Sternlieb, CEO<br>Darren Kozik, EVP & CFO   | <b>Ingevity (NGVT)</b><br>David Li, President & CEO<br>Phillip Platt, SVP & CFO   |   |  |  |
| <b>4:15</b>        | <b>Refreshments on the Terrace</b>  |  |   |   |  |  |

