



**7:00AM REGISTRATION & BREAKFAST - Louis XVI, 2nd Floor**

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| <b>TRACK 1</b><br><i>Versailles, 2nd Floor</i> | <b>TRACK 2</b><br><i>Louis XVI, 2nd Floor</i> |
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|----------------|---|
| 8:00 - 8:40am  | <b>Caterpillar Inc. (CAT)</b><br>Amy Campbell, Investor Relations<br>Matt Hohulin, Investor Relations   |
| 8:45 - 9:25am  | <b>Herc Holdings Inc. (HRI)</b><br>Larry Silber, Chief Executive Officer<br>Barbara Brasier, Chief Financial Officer<br>Elizabeth Higashi, Investor Relations |
| 9:30 - 10:10am | <b>United Rentals Inc. (URI)</b><br>Bill Plummer, Chief Financial Officer<br>Matt Flannery, Chief Operating Officer<br>Ted Grace, Investor Relations          |

**10:10 - 10:25am BREAK**

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| 10:25 - 11:05am | <b>The Timken Company (TKR)</b><br>Phil Fracassa, Chief Financial Officer<br>Jason Hershiser, Investor Relations |
| 11:10 - 11:50am | <b>Cummins Inc. (CMI)</b><br>Brett Merritt, Leader of On-Highway Business<br>Adam Schumm, Investor Relations     |

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| <b>Ritchie Bros. Auctioneers (RBA)</b><br>Ravi Saligram, Chief Executive Officer<br>Sharon Driscoll, Chief Financial Officer<br>Zaheed Mawani, Investor Relations |
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**11:50 - 1:10pm LUNCHEON PRESENTATION - The Vault, Lobby Level**  
**SPEAKERS: ED HYMAN, CHAIRMAN & ECONOMIST**  
**and DONALD STRASZHEIM, CHINA RESEARCH, EVERCORE ISI**

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| 1:10 - 1:50pm | <b>Terex Corporation (TEX)</b><br>John Garrison, Chief Executive Officer<br>Brian Henry, Investor Relations   |
| 1:55 - 2:35pm | <b>Kennametal Inc. (KMT)</b><br>Christopher Rossi, Chief Executive Officer<br>Jan Kees van Gaalen, Chief Financial Officer<br>Kelly Boyer, Investor Relations |

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| <b>China Yuchai International Ltd. (CYD)</b><br>Weng Ming Hoh, President<br>Kelvin Lai, Chief Operating Officer<br>Kevin Theiss, Investor Relations<br>Ryan Dougherty, Investor Relations |
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**2:35-2:50pm BREAK**

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| 2:50-3:30pm | <b>Oshkosh Corporation (OSK)</b><br>Pat Davidson, Investor Relations<br>Jeff Watt, Investor Relations       |
| 3:35-4:15pm | <b>Deere &amp; Company (DE)</b><br>Raj Kalathur, Chief Financial Officer<br>Josh Jepsen, Investor Relations |

\*Eaton is not doing a larger breakout meeting