



Agenda

Monday, February 26

5:30 PM – 7:30 PM **D.R. Horton Dinner (DHI)**
David Auld, President & CEO D.R Horton

Tuesday, February 27

7:30 AM **Registration & Breakfast** – *Louis XVI, St. Regis New York*

8:00 AM – 4:10 PM **1 on 1 & Small Group Meeting** – *3rd Floor, St. Regis New York*

8:10 AM – 8:20 AM **Welcome Remarks** – *Versailles, St. Regis New York*
Stephen Kim, Evercore ISI

8:20 AM – 12:10 PM **Fireside Chats** – *Versailles, St. Regis New York*

<i>8:20 AM – 8:40 AM</i>	<i>PulteGroup, Inc. (PHM)</i>
<i>8:40 AM – 9:00 AM</i>	<i>D.R. Horton (DHI)</i>
<i>9:00 AM – 9:20 AM</i>	<i>USG Corporation (USG)</i>
<i>9:20 AM – 9:40 AM</i>	<i>Armstrong World Industries, Inc. (AWI)</i>
<i>9:40 AM – 9:50 AM</i>	<i>BREAK</i>
<i>9:50 AM – 10:10 AM</i>	<i>Lennar Corporation (LEN)</i>
<i>10:15 AM – 10:35 AM</i>	<i>Masco Corporation (MAS)</i>
<i>10:35 AM – 10:55 AM</i>	<i>MDC Holdings, Inc. (MDC)</i>
<i>11:00 AM – 11:20 AM</i>	<i>Owens Corning (OC)</i>
<i>11:20 AM – 11:40 AM</i>	<i>TRI Pointe Group (TPH)</i>
<i>11:45 AM – 12:05 PM</i>	<i>Meritage Homes Corporation (MTH)</i>

12:05 PM **Box Lunches** – *Louis XVI & 3rd Floor, St. Regis New York*

12:15 PM – 1:10 PM **Luncheon Keynote Presentations** – *Versailles, St. Regis New York*
Frank Nothaft, Chief Economist CoreLogic, Inc. (CLGX)
Greg Vogel, Founder & CEO Land Advisors Organization
Wayne Norris, Director of Business Development Metrostudy

2:00 PM **Afternoon Break** – *Louis XVI, St. Regis New York*

4:10 PM **Conference Concludes**



Participating Companies: 1on1 & Small Group Meetings

Armstrong World Industries, Inc. (AWI)

Vic Grizzle, CEO
Brian MacNeal, CFO

Owens Corning (OC)

Michael McMurray, CFO
Thierry Denis, VP Investor Relations

D.R. Horton, Inc. (DHI)

David Auld, President & CEO
Jessica Hansen, VP Investor Relations

PulteGroup, Inc. (PHM)

Ryan Marshall, President & CEO
Bob O'Shaughnessy, EVP/CFO
Jim Zeumer, VP, Investor Relations

Lennar Corporation (LEN)

Bruce Gross, CFO
Allison Bober, Investor Relations
Ian Frazer, Investor Relations

TRI Pointe Group, Inc. (TPH)

Douglas Bauer, CEO
Michael Grubbs, CFO
Christopher Martin, VP Finance
Glenn Keeler, CAO

Masco Corporation (MAS)

John Sznawajs, CFO
David Chaika, VP Treasurer & IR

USG Corporation (USG)

Matt Hilzinger, CFO
Bill Madsen, Sr. Director IR

MDC Holdings, Inc (MDC)

Robert Martin, Sr. VP & CFO
Kevin McCarty, VP Finance & Corporate
Controller

Meritage Homes Corporation (MTH)

Steve Hilton, Chairman & CEO
Hilla Sferruzza, CFO & EVP
Brent Anderson, VP, Investor Relations