

## 2022 Events Hosted by Daniel Insights

- Tom Teague** – CEO – Salem Leasing (trucking) – Discussed unprecedented tightness in the trucking market. Jan 17.
- Scott Minchin** – Owner – Minchin Buick/GMC – Discussed current trends in the auto dealership industry. Jan 31.
- Tamara Lundgren** – CEO- Schnitzer Steel (SCHN) – SCHN is a major player in the recycling of metals. Discussed current operating environment. Feb 16.
- Lee Cooperman** – Omega Family Office – Outlook for the markets. Feb 18.
- John Helms** – Principal – Milliken Forestry – Discussed current trends in the timber/wood products sector. Feb 25.
- Mike Fascitelli** – Ex CEO- Vornado – Principal, MDF Capital – Outlook for commercial real estate. March 1.
- Shelley Hulgrave** – CFO – Tony Pordon – EVP IR, Penske Auto Group (PAG) – PAG/auto industry update. March 11.
- Bill Rooney** – VP- Strategic Development – Kuehne & Nagel – Commentary on ocean freight supply chain and port congestion issues. March 17.
- Mike McCarthy** – CEO – SMBC Rail Services (manages an 80,000-railcar portfolio). March 30.
- Alan Haig** – Founder – Haig Partners – M&A banker for auto dealership industry. Discussed current competitive landscape for public cos like LIA/CVNA/AN. April 15.
- Brendan Keegan** – CEO – Merchants Fleet – Privately held vehicle fleet services company serving businesses in numerous end markets. May 11.
- Dakota Semler** – CEO – XOS – XOS manufactures last mile Class 5-8 EV trucks. XOS update & outlook for the adoption of last mile EV trucks. May 24.
- Steve Saxon** – Partner, McKinsey & Co. Lives in Shanghai, China – Update on China covid lockdown implications and supply chain issues. June 2.
- Ward Nye** – CEO – Martin Marietta Materials – Company update. June 23.
- Edward DeMartini** – VP Air Cargo, Kuehne & Nagel. Ukraine conflict, stranded aircraft in Russia, rerouting air cargo flight in Europe. June 28.
- Dave Jackson** – CEO – Knight Swift Transportation – Company update. June 29.
- Ryan Green** – CEO – Gridwise. Gridwise is a mobile app gig economy drivers use to track important job-related operating metrics. July 14.
- Curtis Garrett** – Former Chief Strategy Officer – Reconex – LTL sector call. July 15.
- Bob Martin** – CEO – THOR Industries – Company update. July 21.
- Spencer Patton** – CEO – Route Consultant – Update on FDX ISP operators. July 28.
- Scott Hamilton** – President – Leeham Company – Aerospace industry update – August 30.
- Tom Teague** – CEO – Salem Leasing – Dedicated trucking sector call. Sept. 8.
- Todd Maiden** – Finance Editor – FreightWaves – LTL/TL sector call. Oct. 4.
- Ken Langone** – Co- Founder – Home Depot – Outlook for economy, mid-term elections, healthcare, state of America. Oct 11.