

## CSM Macro Conference

Thursday, September 6th, 2018

The Pierre Hotel, New York - The Grand Ballroom

### AGENDA

- 7:15 – 7:55      **Registration & Breakfast**
- 7:55              **Welcoming Remarks**
- 8:00 – 9:00      **Surveying the Geo-Political Landscape**  
*Vicente Fox, President of Mexico (2000-2006)*
- 9:00 – 9:45      **The Future of Energy**  
*Ira Joseph, Head of Global Gas & Power, S&P Global Platts*
- 9:45 – 10:30     **A Conversation with Ken Langone**  
*Co-Founder of Home Depot, Founder & Chairman, Invemed Associates, & Author of *I Love Capitalism! An American Story**  
*Moderated by Lee Cooperman, Founder & CEO, Omega Advisors*
- 10:30 – 11:30    **Trade Panel**  
*Edward Alden, Senior Fellow, Council on Foreign Relations*  
*Stephen Moore, Distinguished Visiting Fellow, The Heritage Foundation*  
*Moderated by Andy Laperriere, Head of U.S. Policy, Cornerstone Macro*
- 11:30-12:15     **2018 Midterm Election Outlook**  
*Amy Walter, National Editor, The Cook Political Report*
- 12:30 – 1:45     **Luncheon Presentation**  
*Steve Cohen, Chairman & CEO, Point72*  
*Moderated by David Fiszal, Founder & CIO, Honeycomb Asset Management*
- 2:00 – 3:00      **Cannabis Market Panel**  
*Mauricio Agudelo, CFO, Bedrocan International*  
*Ben Kovler, Founder & Chairman, Green Thumb Industries (GTI)*  
*Vinay Tolia, CEO, The FLOWR Corporation*  
*Moderated by Michael Carver, CEO, Cambridge Park Capital*
- 3:00 – 3:45      **Mastering the Market Cycle**  
*Howard Marks, Co-Founder & Co-Chairman, Oaktree Capital Management & Author of *Mastering the Market Cycle**
- 3:45 – 4:30      **Markets & Volatility**  
*Michael Green, Portfolio Manager, Thiel Macro*
- 4:30 – 5:15      **Blockchain Technology and Digital Assets for the Institutional Investor**  
*Michael Novogratz, Chairman, CEO & Founder, Galaxy Investment Partners*  
*Moderated by Jarret Christie, Co-Head of Option Strategy & Trading, Cornerstone Macro*
- 5:15              **Closing Remarks**
- 5:15- 6:00       **Cocktail Reception**

**Wi-Fi: Cornerstone**  
**Password: welcome20**