



2019 Agenda

Listing of Confirmed Panelist Companies and Panelists

Tuesday, May 28	
Opening Key Note Speaker and Reception: Ritz-Carlton Hotel	
4:00 - 5:30 pm JPMorgan Jones Walker	<p>Scott Schnipper - JPMorgan Private Bank <i>Head of Foreign Exchange, Commodities & Rates</i> <i>"Prosperity Promised? The Fed, OPEC and the Intersection of Macro and Energy Markets"</i></p>
Wednesday, May 29	
7:45 - 8:00 am	Welcome
8:00 - 8:40 am Societe Generale Sal Patoli	<p>U.S. Offshore E&P - Deep Water and Deep Shelf GOM: The Return of Conventional Exploration <i>GulfSlope Energy, Inc. (GSPE)</i> <i>John Seitz, Chairman, CEO, Interim President & Chief Operating Officer</i> <i>Murphy Oil Corporation (MUR)</i> <i>Gregory Hebertson, Vice President Global Exploration</i> <i>Beacon Offshore Energy (Private)</i> <i>Joseph Leimkuhler, Chief Operating Officer</i> <i>LLOG Exploration Co. (Private)</i> <i>Eric Zimmermann, Vice President of Geology</i></p>
8:40 - 9:10 am Pareto Securities Pierre Conner	<p>Offshore Supply Vessels: When Will the Growing Offshore Recovery Benefit the OSV Market? <i>Hornbeck Offshore Services, Inc. (HOS)</i> <i>Todd Hornbeck, Chairman, President & Chief Executive Officer</i> <i>Tidewater, Inc. (TDW)</i> <i>John Rynd, President, Chief Executive Officer & Director</i> <i>Laborde Marine, LLC (Private)</i> <i>Cliffe Laborde, Managing Member/Owner</i></p>
9:10 - 9:45 am Seaport Global Mike Kelly	<p>U.S. Onshore E&P - The Permian: A Premier Unconventional Basin <i>Abraxas Petroleum Corporation (AXAS)</i> <i>Robert Watson, President and Chief Executive Officer</i> <i>Lilis Energy Inc. (LLEX)</i> <i>Ronald Ormand, Chairman and Chief Executive Officer</i> <i>Rosehill Resources Inc. (ROSE)</i> <i>Brian Ayers, Senior Vice President A&D and Geology</i> <i>Surge Energy America, LLC (Private)</i> <i>Shu Rau, Vice President, Strategic Planning and Business Development</i></p>
9:45 - 10:25 am Pareto Securities Nadia Martin Wiggen	<p>Presentation: Pareto Securities <i>Nadia Martin Wiggen, Partner & Analyst Oil & Gas Research</i> <i>"The Outlook for Oil Markets in a Turbulent Political Climate: Will the Growth in U.S. Shale Alter the Outlook for the Offshore Industry?"</i></p>
10:25 - 10:40 am	Break: Sponsored by Postlethwaite and Netterville
10:40 - 11:20 am Simmons Energy, a division of Piper Jaffray & Co. Pearce Hammond	<p>U.S. Onshore E&P - Natural Gas Focus: Top Tier Return Opportunities in Key Basins <i>Goodrich Petroleum Corporation (GDP)</i> <i>Rob Turnham, President and Chief Operating Officer</i> <i>Montage Resources Corporation (MR)</i> <i>Douglas Kris, Vice President, Investor Relations</i> <i>Tellurian Production Company (TELL)</i> <i>Ami Arief, Senior Vice President, Business Development</i> <i>Indigo Natural Resources LLC (Private)</i> <i>George Francisco, Executive Vice President and Chief Financial Officer</i></p>



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<p>11:20 am - 12:00 pm Simmons Energy, a division of Piper Jaffray & Co. Pearce Hammond</p>	<p>U.S Onshore Oil Field Services: Helping E&Ps Improve Returns in a \$50 - \$60 Oil Price World <i>Flotek Industries, Inc. (FTK)</i> <i>John Chisholm, President and Chief Executive Officer</i> <i>NCS Multistage Holdings, Inc. (NCSM)</i> <i>Ryan Hummer, Chief Financial Officer</i> <i>Danos (Private)</i> <i>Eric Danos, Chief Executive Officer</i> <i>Fairfield Geotechnologies (Private)</i> <i>Charles (Chuck) Davison Jr., President, Chief Executive Officer and Chairman</i></p>
<p>Lunch Panel JPMorgan Joseph Bonavita</p>	<p>Commercial and Investment Banking: Deal Flow Drivers and Commodity Price Volatility <i>IBERIA Corporation</i> <i>Bryan Chapman, Market President, Energy Lending</i> <i>JPMorgan</i> <i>Jeff Stadler, Managing Director, Head of Middle Market Oilfield Services and LA Commercial Banking</i> <i>Seaport Global Securities LLC</i> <i>Michael Schmidt, Managing Director</i> <i>Societe Generale</i> <i>Sal Patoli, Managing Director</i></p>
<p>1:30 - 2:10 pm Northland Capital Markets Jeff Grampp</p>	<p>North American Onshore E&P: Differing Operating Models and Emerging Plays <i>Evolution Petroleum Corporation (EPM)</i> <i>David Joe, Senior Vice President and Chief Financial Officer</i> <i>Northern Oil and Gas Inc. (NOG)</i> <i>Brandon Elliott, CFA, Chief Executive Officer</i> <i>PEDEVCO Corp. (PED)</i> <i>Douglas Schick, President</i> <i>Journey Energy Inc. (TSX:JOY)</i> <i>Alex Verge, President, Chief Executive Officer and Director</i></p>
<p>2:10 - 2:50 pm Jones Walker J. Marshall Page</p>	<p>Capital Availability: Direct Lending Solutions in a Stratified Credit Market <i>Angelo, Gordon & Co.</i> <i>Damon Putman, Managing Director</i> <i>BlackGold Capital Management</i> <i>Shalin Patel, Director of Research</i> <i>The Carlyle Group</i> <i>Stuart Page, Managing Director</i> <i>HPS Investment Partners, LLC</i> <i>Eliot Javanmardi, Managing Director</i> <i>Riverstone Credit Partners, LP</i> <i>Jamie Brodsky, Managing Director</i></p>
<p>2:50 - 3:20 pm RS Energy Group Andrew Gillick</p>	<p>Presentation: RS Energy Group <i>Trevor Sloan, Executive Director and Co-Head of Intelligence</i> <i>"Thriving Through Industry's Digital Transformation"</i></p>
<p>3:20 - 3:35 pm</p>	<p>Break: Sponsored by Postlethwaite and Netterville</p>



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<p>3:35 - 4:25 pm Johnson Rice Ron Mills</p>	<p>U.S. Onshore E&P: Eagle Ford, STACK, and Other Attractive Plays and Recent E&P M&A Activity <i>Amplify Energy Corp. (AMPY)</i> <i>Ken Mariani, President and Chief Executive Officer</i> <i>Chaparral Energy, Inc. (CHAP)</i> <i>Earl Reynolds, Chief Executive Officer</i> <i>Lonestar Resources US Inc. (LONE)</i> <i>Frank Bracken, Chief Executive Officer</i> <i>Penn Virginia Corporation (PVAC)</i> <i>Ben Mathis, Senior Vice President, Operations</i> <i>Sundance Energy Australia Limited (SNDE)</i> <i>Eric McCrady, Managing Director & Chief Executive Officer</i></p>
<p>6:00 - 9:00 pm W. David de Roode and Lockton Global Energy and Marine Preng and Associates</p>	<p>WWII Museum: Buffet-style dinner, entertainment and networking New Orleans Warehouse District 945 Magazine Street Mini-bus transportation from main entrance of Ritz-Carlton on Canal Street to/from museum beginning at 6:00 pm</p>

Thursday, May 30

<p>8:00 - 8:35 am Johnson Rice Daniel Burke</p>	<p>U.S. Onshore Oil Services: Are There Signs of Improvement in 2H 2019? <i>Independence Contract Drilling, Inc. (ICD)</i> <i>Chris Menefee, Senior Vice President, Business Development</i> <i>Mammoth Energy Services, Inc. (TUSK)</i> <i>Don Crist, Director of Investor Relations</i> <i>RigNet (RNET)</i> <i>Lee Ahlstrom, Senior Vice President and Chief Financial Officer</i> <i>Waldemar S. Nelson and Company, Inc. (Private)</i> <i>Marcel Danos, Houston Business Development</i></p>
<p>8:35 - 9:15 am Seaport Global Michael Schmidt</p>	<p>Gulf of Mexico Basin E&P: It's Finally Getting Increasing Attention from Wall Street <i>Talos Energy Inc. (TALO)</i> <i>Sergio Maiworm, Vice President of Finance, Investor Relations and Treasurer</i> <i>W&T Offshore, Inc. (WTI)</i> <i>Tracy Krohn, Founder, Chairman, Chief Executive Officer and President</i> <i>Cantium, LLC (Private)</i> <i>Richard Kirkland, Chief Executive Officer.</i> <i>Upstream Exploration, LLC (Private)</i> <i>Michael Willis, President</i></p>
<p>9:15 - 9:50 am Duff and Phelps Martin Rubio</p>	<p>Presentation: Duff and Phelps <i>Jed DiPaolo, Senior Advisor to Duff and Phelps, formerly 26 years at Halliburton, most recently as Group Senior Vice President of Global Business Development</i> <i>"The Shifting Geopolitical Landscape and Its Impact on the Domestic Oil & Gas Industry"</i></p>
<p>9:50 - 10:25 am Al Petrie Advisors John Herrlin</p>	<p>Presentation: John Herrlin <i>Is the Oil & Gas Industry Still Relevant in a Tech-Crazed World?</i></p>
<p>10:25 - 10:40 am</p>	<p>Break</p>



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10:40 - 11:20 am

Energy Capital Research Group
Mark Rossano

Commodity Hedging: All About That Basis - Growth of Regional Hedging in 2019

Gunvor USA

Carl Altoe, Senior Natural Gas Trader

Morgan Stanley

Grant Brady, Managing Director

PerPetro Energy, LLC (Private)

Joe Leblanc, Co-Founder and Chief Financial Officer

Shell Trading Risk Management

Kevin Hulsey, Director Energy Commodities Risk Marketing

11:20 am - 12:00 pm

Houlihan Lokey
Jerry Eumont

E&P 101: Understanding Parent/Child Drilling Issues and Conventional vs Nonconventional Drilling

Netherland Sewell and Associates, Inc.

Scott Rees, Chairman & Chief Executive Officer

IHS Markit

Raoul LeBlanc, Vice President, North American Unconventional

Lunch Panel

Deloitte LLP
Patrick Brandau

Capital Markets: What Happened to All the Energy IPOs?

Deloitte LLP

Andrew Slaughter, Executive Director

Kroll Bond Rating Agency, Inc.

Corinne Hill, CFA, Senior Director, Corporates

Lockton Global Energy and Marine

W. David de Roode, Partner

New York Stock Exchange

Marc D. Cunningham - Head of Energy, Industrials, Capital Markets

Oslo Børs (Stock Exchange)

Øivind Amundsen, EVP Primary Markets & Legal Affairs

Pareto Securities

Christian Jomaas, Head of Investment Banking

Simmons Energy, a division of Piper Jaffray & Co.

Barry Kessler, Managing Director

1:30 - 2:15 pm

Jones Walker
Curtis Hearn

International Oil Field Services: The Recovery Has Begun

Dril-Quip, Inc. (DRQ)

Jeffrey J. Bird, Senior Vice President - Production Operations and Chief Financial Officer

Frank's International N.V. (FI)

Michael Kearney, Chairman, President and Chief Executive Officer

Epic Companies, LLC (Private)

Chuck Webb, Vice President, Corporate Development

QMax (Private)

Alex Church, Vice President, International Sales

Witt O'Brien's LLC (Private)

Bob Patterson, Managing Director

2:15 - 3:00 pm

Jones Walker
Britton Seal

Private Equity: What's the Impact of Closed Public Equity Markets?

Bayou City Energy Management, LLC

Mark Stoner, Partner

IOG Capital LP

Marc Rowland, Founder and Senior Managing Director

Lime Rock Partners

Gary Sernovitz, Managing Director

OFS Energy Fund, LLC

Bruce Ross, Managing Partner



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3:00 - 3:45 pm
Drillinginfo, Inc.

Wrap-up Presentation: Where Are We Headed Next? Second Half 2019 and 2020 Outlook
Drillinginfo, Inc.
Bernadette Johnson, Vice President, Market Intelligence

5:30 - 7:30 pm

Closing Reception at a private residence and courtyard in the heart of the French Quarter
726 Orleans between Bourbon and Royal, ½ block from St. Louis Cathedral
Mini-bus transportation from main entrance of Ritz-Carlton on Canal Street to event beginning at 5:30 pm

Friday, May 31

FIELD TRIPS

Three field trip options are available:

Crew boat trip in the shallow water Gulf of Mexico to visit an Upstream Exploration production platform in Breton Sound

Airboat trip to view south Louisiana marshland production facilities

Visit to world class International Matex Tank Terminal Facility in St. Rose, LA with
>16 million barrels of storage capacity (>200 tanks) for petroleum products, edible oils and chemical as well as five large ship berths and 18 barge berths on the Mississippi River.

Confirmed E&P and OFS Companies

Abraxas Petroleum Corporation
Amplify Energy Corp.
Beacon Offshore Energy
Cantium, LLC
Chaparral Energy, Inc.
Danos
Dril-Quip, Inc.
Epic Companies, LLC
Evolution Petroleum Corporation
Fairfield Geotechnologies
Flotek Industries, Inc.
Frank's International N.V.
Goodrich Petroleum Corporation
GulfSlope Energy, Inc.
Hornbeck Offshore Services, Inc.
Independence Contract Drilling, Inc.
Indigo Natural Resources, LLC
Journey Energy, Inc.
Laborde Marine, LLC
Lilis Energy Inc.
LLOG Exploration Co.
Lonestar Resources US Inc.
Mammoth Energy Services, Inc.
Montage Resources Corporation
Murphy Oil Corporation
NCS Multistage Holdings, Inc.
Northern Oil and Gas Inc.
PEDEVCO Corp.
Penn Virginia Corporation
PerPetro Energy, LLC
QMax
Ranger Energy Services, Inc.
RigNet
Rosehill Resources Inc.



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Shell Trading Risk Management
Sundance Energy Australia Limited
Surge Energy America, LLC
Talos Energy Inc.
Tellurian Production Company
Tidewater, Inc.
Upstream Exploration, LLC
Waldemar S. Nelson and Company, Inc.
W&T Offshore, Inc.
Witt O'Brien's LLC

Other Panelist Firms

Angelo, Gordon & Co.
Bayou City Energy Management, LLC
BlackGold Capital Management
The Carlyle Group
Deloitte LLP
Drillinginfo, Inc.
Duff and Phelps
Energy Capital Research Group
Gunvor USA
HPS Investment Partners, LLC
Houlihan Lokey
IBERIA Corporation
IHS Markit
IOG Capital LP
JPMorgan
Kroll Bond Rating Agency, Inc.
Lime Rock Partners
Lockton Global Energy and Marine
Morgan Stanley
Netherland Sewell and Associates, Inc.
New York Stock Exchange
OFS Fund, LLC
Oslo Børs (Stock Exchange)
Pareto Securities
Riverstone Credit Partners, LP
RS Energy Group
Seaport Global Securities, LLC
Simmons Energy, a division of Piper Jaffray & Co.
Societe Generale