



**2019 Updated Agenda as of 5-8-19**

**Listing of Confirmed Panelist Companies and Panelists; Additional Panelists Pending**

**Tuesday, May 28**

**Opening Key Note Speaker and Reception: Ritz-Carlton Hotel**

4:00 - 5:30 pm

*Scott Schnipper - JPMorgan Private Bank*

JPMorgan

*Head of Foreign Exchange, Commodities & Rates  
"Prosperity Promised? The Fed, OPEC and the Intersection of Macro and Energy Markets"*

**Wednesday, May 29**

7:45 - 8:00 am

Welcome

8:00 - 8:40 am

**U.S. Offshore E&P - Deep Water and Deep Shelf GOM: The Return of Conventional Exploration**

Societe Generale

*GulfSlope Energy, Inc. (GSPE)  
John Seitz, Chairman, CEO, Interim President & COO  
Murphy Oil Corporation (MUR)  
Gregory Hebertson, Vice President Global Exploration  
Beacon Offshore Energy (Private)  
Joseph Leimkuhler, Chief Operating Officer  
LLOG Exploration Co. (Private)  
Eric Zimmermann, Vice President of Geology*

8:40 - 9:10 am

**Offshore Supply Vessels: When Will the Growing Offshore Recovery Benefit the OSV Market?**

Pareto Securities

*Hornbeck Offshore Services, Inc. (HOS)  
Todd Hornbeck, Chairman, President & CEO  
Tidewater, Inc. (TDW)  
John Rynd, President and Chief Executive Officer  
Laborde Marine, LLC (Private)  
Peter Laborde, Managing Member/Owner*

9:10 - 9:45 am

**U.S. Onshore E&P - The Permian: A Premier Unconventional Basin**

Seaport Global

Mike Kelly

*Abraxas Petroleum Corporation (AXAS)  
Robert Watson, President and Chief Executive Officer  
Lilis Energy Inc. (LLEX)  
Ronald Ormand, Chairman and Chief Executive Officer  
Rosehill Resources Inc. (ROSE)  
Brian Ayers, Senior Vice President A&D and Geology  
Surge Energy America, LLC (Private)*

9:45 - 10:25 am

**Presentation: Pareto Securities**

Pareto Securities

Nadia Martin Wiggen

*Nadia Martin Wiggen, Partner & Analyst Oil & Gas Research  
"The Outlook for Oil Markets in a Turbulent Political Climate: Will the Growth in U.S. Shale Alter the Outlook for the Offshore Industry?"*

10:25 - 10:40 am

Break: Sponsored by Postlethwaite and Netterville

10:40 - 11:20 am

**U.S. Onshore E&P - Natural Gas Focus: Top Tier Return Opportunities in Key Basins**

*Goodrich Petroleum Corporation (GDP)  
Rob Turnham, President and Chief Operating Officer  
Montage Resources Corporation (MR)  
Douglas Kris, Vice President, Investor Relations  
Indigo Natural Resources LLC (Private)  
George Francisco, Executive Vice President and Chief Financial Officer*

11:20 am - 12:00 pm

**U.S Onshore Oil Field Services: Helping E&Ps Improve Returns in a \$50 - \$60 Oil Price World**

Simmons Energy, a division of Piper Jaffray & Co.

*Flotek Industries (FTK)  
John Chisholm, Chief Executive Officer  
NCS Multi Stage Holdings Inc. (NCSM)  
Ryan Hummer, Chief Financial Officer  
Danos (Private)  
Eric Danos, Chief Executive Officer  
Fairfield Geotechnologies (Private)*



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*Charles (Chuck) Davison Jr., President and Chief Executive Officer*

Lunch Panel  
JPMorgan  
Joseph Bonavita

**Commercial and Investment Banking: Deal Flow Drivers and Commodity Price Volatility**

*IBERIA Corporation*  
*Bryan Chapman, Market President, Energy Lending*  
*JPMorgan*  
*Jeff Stadler, Managing Director, Head of Middle Market Oilfield Services and LA Commercial Banking*  
*Seaport Global Securities LLC*  
*Michael Schmidt, Managing Director*  
*Societe Generale*  
*Sal Patoli, Managing Director*

1:30 - 2:10 pm  
Northland  
Jeff Grampp

**U.S. Onshore E&P: Differing Operating Models and Emerging Plays**

*Evolution Petroleum Corporation (EPM)*  
*David Joe, Senior Vice President and Chief Financial Officer*  
*Northern Oil and Gas Inc. (NOG)*  
*Brandon Elliott, CFA, Chief Executive Officer*  
*Pacific Energy Development Corp. (PEDEVCO) (PED)*  
*Douglas Schick, President*  
*Journey Energy Inc. (TSX:JOY)*  
*Alex Verge, President, Chief Executive Officer and Director*

2:10 - 2:50 pm  
Jones Walker  
J. Marshall Page

**Capital Availability: Direct Lending Solutions in a Stratified Credit Market**

*Angelo, Gordon & Co.*  
*Damon Putman, Managing Director*  
*BlackGold Capital Management*  
*Shalin Patel, Director of Research*  
*The Carlyle Group*  
*Stuart Page, Head of Oil Field Services*  
*HPS Investment Partners, LLC*  
*Eliot Javanmardi, Managing Director*  
*Riverstone Credit Partners, LP*  
*Jamie Brodsky, Managing Director*

2:50 - 3:20 pm  
RS Energy Group

**Presentation: RS Energy Group**

*Trevor Sloan, Executive Director and Co-Head of Intelligence*  
*"Thriving Through Industry's Digital Transformation"*

3:20 - 3:35 pm

Break: Sponsored by Postlethwaite and Netterville

3:35 - 4:25 pm  
Johnson Rice  
Ron Mills

**U.S. Onshore E&P: Eagle Ford, STACK, and Other Attractive Plays and Recent E&P M&A Activity**

*Amplify Energy Corp. (AMPY)*  
*Ken Mariani, President and Chief Executive Officer*  
*Chaparral Energy, Inc. (CHAP)*  
*Earl Reynolds, Chief Executive Officer*  
*Lonestar Resources US, Inc. (LONE)*  
*Frank Bracken, Chief Executive Officer*  
*Penn Virginia Corporation (PVAC)*  
*Ben Mathis, Senior Vice President, Operations*  
*Sundance Energy Australia Limited (SNDE)*  
*Eric McCrady, Managing Director & CEO*

4:25 - 5:00 pm  
Al Petrie Advisors  
John Herrlin

**Presentation: John Herrlin**

*26th Annual 2018 F&D Cost Study and E&P Analysis*

6:00 - 9:30 pm  
W. David de Roode and Lockton Partners  
Preng and Associates

**WWII Museum: Buffet-style dinner, entertainment and networking**  
**New Orleans Warehouse District 945 Magazine Street**



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Mini-bus transportation from main entrance of Ritz-Carlton on Canal Street to/from museum beginning at 6:00 pm

**Thursday, May 30**

8:00 - 8:35 am Johnson Rice Daniel Burke	<p><b>U.S. Onshore Oil Services: Are There Signs of Improvement in 2H 2019?</b>  <i>Independence Contract Drilling, Inc. (ICD)</i>  <i>Philip Choyce, Executive Vice President and Chief Financial Officer</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 CFO</i>  <i>Waldemar S. Nelson and Company, Inc. (Private)</i>  <i>Marcel Danos, Houston Business Development</i></p>
8:35 - 9:15 am Seaport Global Michael Schmidt	<p><b>Gulf of Mexico Basin E&amp;P: It's Finally Getting Increasing Attention from Wall Street</b>  <i>Talos Energy Inc. (TALO)</i>  <i>Tim Duncan, Founder, President and Chief Executive Officer</i>  <i>W&amp;T Offshore, Inc. (WTI)</i>  <i>Tracy Krohn, Founder, Chairman, CEO 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>
9:15 - 9:50 am Duff and Phelps Martin Rubio	<p><b>Presentation: Duff and Phelps</b>  <i>Jed DiPaolo, Senior Advisor to Duff and Phelps</i></p>
9:50 - 10:25 am Wood Mackenzie	<p><b>Presentation: Wood Mackenzie</b></p>
10:25 - 10:40 am	<p>Break</p>
10:40 - 11:20 am Energy Capital Research Group Mark Rossano	<p><b>Commodity Hedging: All About That Basis - Growth of Regional Hedging in 2019</b>  <i>Gunvor USA</i>  <i>Carl Altoe, Senior Natural Gas Trader</i>  <i>Morgan Stanley</i>  <i>Grant Brady, Managing Director</i>  <i>PerPetro Energy, LLC (Private)</i>  <i>Joe Leblanc, Co-Founder and Chief Financial Officer</i>  <i>Shell Trading Risk Management</i>  <i>Kevin Hulsey, Director Risk Management Energy Commodities</i></p>
11:20 am - 12:00 pm Houlihan Lokey Jerry Eumont	<p><b>E&amp;P 101: Understanding Parent/Child Drilling Issues and Conventional vs Nonconventional Drilling</b>  <i>Netherland Sewell and Associates, Inc.</i>  <i>Scott Rees, Chairman &amp; CEO</i>  <i>IHS Markit</i></p>
Lunch Panel Deloitte LLP Patrick Brandau	<p><b>Capital Markets: What Happened to All the Energy IPOs?</b>  <i>Deloitte LLP</i>  <i>Andrew Slaughter, Executive Director</i>  <i>Kroll Bond Rating Agency, Inc.</i>  <i>Corinne Hill, CFA, Senior Director, Corporates</i>  <i>Lockton Partners, LLC</i>  <i>W. David de Roode, Partner</i>  <i>New York Stock Exchange</i>  <i>Marc D. Cunningham - Head of Energy, Industrials, Capital Markets</i>  <i>Oslo Børs (Stock Exchange)</i>  <i>Øivind Amundsen, EVP Primary Markets &amp; Legal Affairs</i></p>



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*Simmons Energy, a division of Piper Jaffray & Co.  
Paul Steier, 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 CFO*  
*Frank's International N.V. (FI)*  
*Michael Kearney, Chief Executive Officer*  
*Epic Companies (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*

3:00 - 3:45 pm  
Drilling Info, Inc.

**Wrap-up Presentation: Where Are We Headed Next? Second Half 2019 and 2020 Outlook**  
*Drilling info, 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**

**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 >16MM barrels of storage capacity (>200 tanks) for petroleum products, edible oils and chemicals as well as five large ship berths and 18 barge berths on 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.
- Earthstone Energy, Inc.
- Epic Companies
- Evolution Petroleum Corporation
- Fairfield Geotechnologies
- Flotek Industries
- Frank's International N.V.
- Goodrich Petroleum Corporation
- GulfSlope Energy, Inc.



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Laborde Marine, LLC  
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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.  
Pacific Energy Development Corp. (PEDEVCO)  
Penn Virginia Corporation  
PerPetro Energy, LLC  
QMax  
Ranger Energy Services, Inc.  
RigNet  
Rosehill Resources Inc.  
Shell Trading Risk Management  
Sundance Energy Australia Limited  
Surge Energy America, LLC  
Talos Energy Inc.  
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  
Drilling Info, Inc.  
Duff and Phelps  
Gunvor USA  
HPS Investment Partners, LLC  
IHS Markit  
IOG Capital LP  
JPMorgan  
Kroll Bond Rating Agency, Inc.  
Lime Rock Partners  
Lockton Partners, LLC  
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  
Wood MacKenzie