

GRANT'S

FALL 2025 CONFERENCE

On Tuesday, Sept. 30, join us at the Plaza Hotel (or remotely, via live webinar) to hear from some of the biggest names in finance. We'll cover a wide variety of topics—see our agenda, in full, below—and you'll meet other like-minded readers and investors. Do come—it wouldn't be the same without you!

- 8:20 A.M. *Registration and continental breakfast*
- 8:50 *Welcome!*
- 9:05 MATTHEW MCLENNAN, "Sovereign debt is abundant; here's what's scarce"
- 9:50 NATE KOPPIKAR, "Hotel private equity: You can check out any time you like, but you can never actually leave"
- 10:35 JOHN HUGHES, "Concepts in strategic value—the remunerative kind—as applied"
- 11:20 *Mix & mingle*
- 11:35 KEVIN WARSH in conversation with JAMES GRANT
- 12:20 P.M. *Luncheon*
- 1:30 PIERRE LASSONDE, "A 1:1 ratio of the Dow to the gold price: A preview of a thrilling remake"
- 2:10 VICTOR KHOSLA, "Credit investing: The 800-pound gorilla in the room"
- 2:50 *Mix & mingle, part II*
- 3:05 TERRENCE MCLEAN, "Shelter from the storm: Uncorrelated returns in catastrophe risk"
- 3:45 JONATHAN LEWINSOHN, "Opportunity in micro credit cycles"
- 4:25 DAVID S.H. ROSENTHAL, "The gaslit asset class: The technological and operational risks of cryptocurrencies"
- 5:05 *Cocktails with Toby Williams and her orchestra*

Reserve your seat at GrantsPub.com/events