

## SHIPPING – IS IT ALL GLITTER & GOLD?

EST Time

DAY ONE: TUESDAY, OCTOBER 12, 2021

8:30 am – 8:45 am

### WELCOME REMARKS

**Mr. Nicolas Bornozis**, President – **Capital Link, Inc.**

**Mr. Theodore Jadick**, Managing Director, CEO & President – **DNB Markets;**  
**Conference Chairman**

8:50 am – 9:40 am

### SHIPPING – IS IT ALL GLITTER & GOLD?

What is different this time? Are we at the beginning of a new supercycle for shipping spreading eventually across all market segments? Covid-19, technology, regulations and geopolitics have a transformational impact on the industry. What are major opportunities and challenges looking ahead? CEOs from the major market segments share their insight as to what makes this cycle different and the outlook ahead.

#### Moderator:

- **Mr. Theodore Jadick**, Managing Director, CEO & President – **DNB Markets;**  
**Conference Chairman**

#### Panelists:

- **Dr. John Coustas**, CEO – **Danaos Corporation (DAC)**
- **Mr. Robert Bugbee**, President – **ENETI Inc. (NETI) & Scorpio Tankers Inc. (STNG)**
- **Mr. Paul Wogan**, CEO – **GasLog Partners (GLOP)**
- **Mr. Petros Pappas**, CEO – **Star Bulk Carriers (SBLK)**
- **Dr. Nikolas P. Tsakos**, CEO – **Tsakos Energy Navigation (TNP);** Chairman – **INTERTANKO 2014-201**

9:45 am – 10:35 am

### DRY BULK SECTOR PANEL

#### Moderator:

- **Mr. Jorgen Lian**, Equity Analyst – **DNB Markets, Inc**

#### Panelists:

- **Mr. Gary Vogel**, CEO – **Eagle Bulk Shipping (EGLE)**
- **Mr. Martyn Wade**, CEO – **Grindrod Shipping Holdings (GRIN)**
- **Mr. John Michael Radziwill**, CEO – **GoodBulk;** C Transport Maritime
- **Mr. Polys Hajioannou**, CEO – **Safe Bulkers (SB)**
- **Mr. Stamatis Tsantanis**, Chairman & CEO – **Seenergy Maritime Holdings (SHIP)**

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10:40 am – 11:00 am

### KEYNOTE ADDRESS

#### CREATING AND SUSTAINING AMERICAN LEADERSHIP IN THE TRANSITION TO A GLOBAL CLEAN ENERGY ECONOMY



**Mrs. Kelly Speakes-Backman**

Acting Assistant Secretary, Principal Deputy Secretary for the Office  
of Energy Efficiency and Renewable Energy  
U.S. Department of Energy

11:05 am – 11:50 am

### INDUSTRY PREPAREDNESS FOR COP26 AND ITS AFTERMATH

The panel will focus on the energy transition and the pathways towards zero emissions shipping. This is one of the most critical challenges the industry faces today, and the discussion is particularly timely given recent regulatory developments and the upcoming COP26 meeting.

#### Moderator:

- **Mr. Knut Ørbeck-Nilssen, CEO – DNV Maritime**

#### Panelists:

- **Mr. Cameron Mackey, COO – Eneti Inc. (NETI)**
- **Mr. John C. Wobensmith, President & CEO – Genco Shipping & Trading (NYSE: GNK)**
- **Mrs. Lois Zabrocky, CEO – International Seaways (INSW)**
- **Mr. Bo Cerup-Simonsen, CEO - Mærsk Mc-Kinney Møller Center for Zero Carbon Shipping**

11:55 am -12:45 pm

### THE NEW LANDSCAPE OF BANK FINANCE FOR SHIPPING

The panel will discuss the evolving role of banks as capital providers to shipping. Are banks stepping up or decreasing their involvement with shipping? What is the impact of alternative sources of capital? It will also address the impact of regulations and green shipping as well as the emergence of new regional and international hubs providing capital to shipping.

#### Moderator:

- **Mr. Daniel Rogers, Partner - Watson Farley Williams**

#### Panelists:

- **Mr. Philipp Wuenschmann, Global Head of Shipping - Berenberg**
- **Mr. Shreyas Chipalkatty, Global Head of Shipping – Citi**
- **Mr. Evan Cohen, Managing Director & Group Head of Maritime Finance – CIT**
- **Mr. Ilias Katsoulis, Global Head of Shipping, Global Credit Financing and Solutions - Deutsche Bank AG**
- **Mr. Christos Tsakonas, Global Head of Shipping – DNB**

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12:50 pm – 1:15 pm

### SPOTLIGHT ON ATLAS CORPORATION - 1X1 Discussion



**Mr. Bing Chen**  
President & Chief  
Executive Officer  
Atlas Corp. (ATCO)



**Mr. James T. Cirenza**  
Managing Director  
DNB Markets, Inc

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1:20 pm – 2:10 pm

### CRUDE TANKERS SECTOR PANEL

**Moderator:**

- **Mr. Ben Nolan**, Head of Maritime Research – **Stifel**

**Panelists:**

- **Mr. Hugo de Stoop**, CEO – **Euronav (EURN)**
- **Mr. Lars Barstad**, CEO – **Frontline Management (FRO)**
- **Mr. Jeffrey D. Pribor**, SVP & CFO – **International Seaways (INSW)**
- **Mr. Robert Burke**, Partner & CEO – **Ridgebury Tankers**
- **Mr. Harrys Kosmatos**, Corporate Development Officer – **TEN Ltd. (Tsakos Energy Navigation (TNP))**

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2:15 pm – 2:55 pm

### EXPANDING THE RESEARCH & INVESTOR UNIVERSE FOR SHIPPING

Research & Trading Platforms – Social Media – Financial & Industry Blogs

**Moderator:**

- **Mr. Robert Bugbee**, President – **ENETI Inc. (NETI) & Scorpio Tankers Inc. (STNG)**

**Panelists:**

- **Mr. J Mintzmyer**, Head of Research – **Value Investor's Edge**
- **Mr. Omar Nokta**, Head of US Securities – **Clarksons Platou**
- **Mr. Calvin Froedge**, Founder – **TankerData.com**

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**End of Day 1 – Thank you for joining us!**

View Day 2 in next page

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## SHIPPING – IS IT ALL GLITTER & GOLD?

### DAY TWO: WEDNESDAY, OCTOBER 13, 2021 (Agenda in EST time)

8:30 am – 8:50 am

#### OPENING KEYNOTE REMARKS - U.S. ADMINISTRATION PRIORITIES & POLICIES IN INTERNATIONAL TRADE



**Mrs. Diane Farrell**

Acting Under Secretary and Deputy Under Secretary  
For International Trade  
U.S. Department of Commerce

8:55 am – 9:45 am

#### A NEW ERA FOR GLOBAL COMMERCE & TRADE

**Moderator:**

- **Mr. John Keough**, Partner - **Clyde & Co**

**Panelists:**

- **Mr. Andreas Hadjipetrou**, Managing Director / Chief Commercial Officer – **Columbia Shipmanagement Ltd.**
- **Mr. Bud Darr**, Executive Vice President, Maritime Policy and Government Affairs – **MSC Group**
- **Mr. Martin Fruergaard**, CEO - **Pacific Basin**
- **Mr. Lasse Kristoffersen**, Chief Executive Officer - **Torvald Klaveness**; President – **Norwegian Shipowners Association**, 2018-2020
- **Mr. Aaron Bresnahan**, President & Managing Director– **Wärtsilä North America Inc.**

9:50 am – 10:40 am

#### CONTAINER SECTOR PANEL

**Moderator:**

- **Mr. Christian Wetherbee**, Managing Director, Transportation & Shipping Research – **Citi Research**

**Panelists:**

- **Mr. Graham Talbot**, CFO – **Atlas Corporation (ATCO)**
- **Mr. Evangelos Chatzis**, CFO – **Danaos Corporation (DAC)**
- **Mr. Aristides Pittas**, Chairman & CEO – **Euroseas (ESEA) & Eurodry (EDRY)**
- **Mr. George Youroukos**, Executive Chairman – **Global Ship Lease (GSL)**
- **Mr. Constantin Baack**, CEO – **MPC Container Ships (OSLO: MPCC)**

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### 10:45 am – 11:10 am SPOTLIGHT ON SOVCOMFLOT – 1x1 Discussion



**Mr. Nikolai Kolesnikov**  
Executive Vice President  
& Chief Financial Officer  
**Sovcomflot**  
(MOEX: FLOT)



**Mr. Theodore Jadick,**  
Managing Director, CEO  
and President – **DNB**  
**Markets** - Conference  
Chairman

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### 11:15 am – 12:05 pm CHARTING CORPORATE STRATEGY IN A FAST-CHANGING WORLD

Panel to discuss strategies on diversification, fleet renewal, capital allocation

**Moderator:**

- **Mr. Theodore Jadick**, Managing Director, CEO and President – **DNB Markets;**  
**Conference Chairman**

**Panelists:**

- **Mr. Jerry Kalogiratos**, CEO – **Capital Product Partners (CPLP)**
- **Mr. John C. Wobensmith**, President & CEO – **Genco Shipping & Trading (GNK)**
- **Mr. Ulrik Uhrenfeldt Andersen**, CEO – **Golden Ocean (GOGL)**
- **Mr. George Achniotis**, Director & Executive VP-Business Development, **Navios Maritime Partners LP (NMM)**
- **Mr. Paulo Almeida**, CIO - **Tufton Oceanic Investments Ltd.**

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### 12:10 pm – 1:00 pm PRODUCT TANKERS SECTOR PANEL

**Moderator:**

- **Mr. James T. Cirenza**, Managing Director – **DNB Markets, Inc**

**Panelists:**

- **Mr. Anthony Gurnee**, Founder and CEO – **Ardmore Shipping Corporation (ASC)**
- **Mr. Carlos Balestra Di Mottola**, CFO – **d'Amico International Shipping S.A. (BIT:DIS)**
- **Mr. Mikael Skov**, CEO – **Hafnia (OSLO: HAFNIA)**
- **Mr. Valentios (Eddie) Valentis**, CEO, **Pyxis Tankers (PXS)**
- **Mr. Jacob Meldgaard**, CEO – **TORM (TRMD)**

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### 1:05 pm – 1:55 pm CAPITAL MARKETS PANEL

**Moderator:**

- **Mr. Robert Lustrin**, Counsel - **Reed Smith**

**Panelists:**

- **Mr. Marius Halvorsen**, Investment banking, USA – **Arctic Securities**

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- **Mrs. Christa Volpicelli**, Managing Director & Head of Maritime Investment Banking – Citi
- **Mr. Jae Kwon**, Managing Director and Head of Corporate Finance – DNB
- **Mr. Larry Glassberg**, Partner & Senior Managing Director, Investment Banking – Maxim Group LL
- **Mr. Chris Weyers**, Managing Director, Head of Maritime Investment Banking – Stifel

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2:00 pm -2:50 pm

### THE SURGE IN SPAC IPOs – PLENTY OF CAPITAL LOOKING FOR DEALS

**Moderator:**

- **Mr. Keith J. Billotti**, Partner, Co-Head of Capital Markets Group – Seward & Kissel LLP

**Panelists:**

- **Mr. Vasilis Gregoriou**, CEO - Advent Technologies (ADN)
- **Mr. Akis Tsirigakis**, Co-CEO – Growth Capital Acquisition Corp
- **Mr. George Syllantavos**, Board Member - Ithax Acquisition Corp. (Nasdaq: ITHX); Co-Founder, Co-CEO & CFO - Growth Capital Acquisition Corp. (Nasdaq: GCAC)
- **Mr. Alexandre Ibrahim**, Head of International Capital Markets – New York Stock Exchange
- **Mr. Larry Glassberg**, Partner & Senior Managing Director, Investment Banking – Maxim Group LL

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**END of Day 2 – Thank you for joining us!**

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## SHIPPING – IS IT ALL GLITTER & GOLD?

### DAY THREE: THURSDAY, OCTOBER 14, 2021 (Agenda in EST time)

8:30 am – 8:50 am

#### OPENING KEYNOTE REMARKS: MARITIME NEW YORK - GREEN ENERGY AND GLOBAL COMMERCE



**Mr. Brian A. Benjamin**  
Lieutenant Governor  
New York State

8:55 am – 9:40 am

#### LPG SECTOR PANEL

**Moderator:**

- **Mr. Greg Wasikowski, CFA**, Associate Partner – **Webber Research**

**Panelists:**

- **Mr. Anders Onarheim**, CEO – **BW LPG (OSLO: BWLPG)**
- **Mr. Ted Young**, CFO – **Dorian LPG (USA) LLC (LPG)**
- **Mr. Charles Maltby**, CEO – **BW Epic Kosan (OSLO: BWEK)**

9:45 am – 10:10 am

#### SPOTLIGHT ON NAVIOS MARITIME PARTNERS – 1x1 Discussion



**Ms. Angeliki Frangou**  
Chairwoman & CEO  
**Navios Maritime  
Partners (NMM)**



**Mr. Christian Wetherbee**  
Managing Director,  
Transportation & Shipping  
Research  
**Citi Research**

10:15 am – 11:05 am

#### SUSTAINABILITY – AS A CORE BUSINESS STRATEGY

This panel will focus on four main topics – What is Sustainability? What is included in Sustainability? – How is it measured? – What are the practical implications / advantages to companies that focus on Sustainability? – What are the expectations of stakeholders (business & trading partners, society) regarding Sustainability?

**Moderator:**

- **Ms. Kiara Konti** | Director | Climate Change and Sustainability Services – **EY**

**Panelists:**

- **Mr. Matt Borys**, Treasurer & Head of Capital Markets – **Atlas Corp. (ATCO)**
- **Mr. Alex Hadjipateras**, EVP of Business Development – **Dorian LPG (USA) LLC (LPG)**
- **Mr. Brian Gallagher**, Head of Investor Relations & Communications, Member of the Sustainability Committee – **Euronav (EURN)**
- **Ms. Charis Plakantonaki**, Chief Strategy Officer - **Star Bulk Carriers Corp (SBLK)**
- **Mr. Kim Balle**, CFO – **TORM (TRMD)**

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11:10 am – 12:00 pm

### LNG SECTOR PANEL

**Moderator:**

- **Mr. Randy Giveans**, Group Head of Energy Maritime, Shipping Equity Research - **Jefferies**

**Panelists:**

- **Mr. Oystein Kalleklev**, CEO – **FLEX LNG (FLNG)**
- **Mr. Paolo Enoizi**, CEO - **GasLog Partners (GLOP)**
- **Mr. Karl Fredrik Staubo**, CEO - **Golar LNG (GLNG)**
- **Mr. Richard Gilmore**, Executive Vice President – **Maran Gas Maritime**

### ADDRESSING GLOBAL SUPPLY CHAIN DISRUPTIONS

12:05 pm – 12:25 pm

### KEYNOTE ADDRESS



**Mr. Daniel D. Maffei**  
Chairman  
**Federal Maritime Commission (FMC)**

12:30 pm – 1:25 pm

### PANEL DISCUSSION

**Moderator:**

- **Mr. Sam Ruda**, Director - **Port Authority NY/NJ**

**Panelists:**

- **Mr. Ken O'Brien**, President - **Gemini Shippers Group**; Member of the Ocean Freight National Shipper Advisory Committee of the Federal Maritime Commission
- **Mr. Steve Hughes**, President & CEO - **HCS International**; Motor & Equipment Manufacturers & Auto Care Associations Representative on Ocean Freight National Shipper Advisory Committee of the Federal Maritime Commission
- **Mr. Bill Rooney**, VP, Strategic Development - **Kuehne + Nagel**
- **Mr. Andrew Genn**, Senior Vice President, Ports & Transportation Department – **New York Economic Development Corporation (NYEDC)**
- **Mr. Rick DiMaio**, SVP, Supply Chain Operations – **Office Depot**
- **Mr. John W. Butler**, President and CEO - **World Shipping Council**



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1:30 pm – 2:30 pm

### ANALYST PANEL

#### Moderator:

- **Mr. Robert Bugbee**, President – **ENETI Inc. (NETI) & Scorpio Tankers Inc. (STNG)**

#### Panelists:

- **Mr. Lars Bastian Ostereng**, Equity Analyst – Shipping – **Arctic Securities**
- **Mr. Omar Nokta**, Head of US Securities – **Clarksons Platou**
- **Mr. Jorgen Lian**, Equity Analyst – **DNB Markets, Inc**
- **Mr. Randy Giveans**, Group Head of Energy Maritime, Shipping Equity Research – **Jefferies**
- **Mr. Magnus Fyhr**, Managing Director, Head of Maritime Research - **H.C. Wainwright**
- **Mr. Ben Nolan**, Head of Maritime Research – **Stifel**

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**END OF FORUM – Thank you for joining us!**

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