

Technology

Communications Equipment & IT Infrastructure	Cybersecurity	Internet	Internet
Erik Suppiger (415) 835-3918	Trevor Walsh (415) 835-3934	Andrew Boone (415) 835-3902	Nicholas Jones (212) 906-3528
Arista Networks (ANET) Aviat Networks (AVNW) Backblaze (BLZE) Box (BOX) Cambium Networks Corp. (CMBM) Cisco Systems (CSCO) Datadog (DDOG) * Dynatrace (DT) Nutanix (NTNX) Ooma (OOMA) Ribbon Communications (RBBN) SolarWinds Corp. (SWI) Varonis Systems (VRNS)	Axon Enterprise (AXON) CrowdStrike Holdings (CRWD) CyberArk (CYBR) Cloudflare (NET) Okta (OKTA) Palo Alto Networks (PANW) Qualys (QLYS) SentinelOne (S) SoundThinking (SSTI) Splunk (SPLK) Zscaler (ZS)	AdTheorent Holding Company (ADTH) Alphabet (GOOGL) DoorDash (DASH) DoubleVerify Holdings (DV) Duolingo (DUOL) Fiverr International (FVRR) Innovid Corp. (CTV) LegalZoom.com (LZ) Maplebear (CART) Meta Platforms (META) Nerdy (NRDY) ODDITY Tech (ODD) Outbrain (OB) Peloton Interactive (PTON)	PubMatic (PUBM) Rent the Runway (RENT) Rover Group (ROVR) Shopify (SHOP) * Shutterstock (SSTK) Snap (SNAP) Squarespace (SQSP) Taboola.com (TBLA) Tremor International (TRMR) Uber Technologies (UBER) Unity Software (U) Upwork (UPWK) Viant Technology (DSP) Wix.com (WIX)
			1stdibs.com (DIBS) ACV Auctions (ACVA) Airbnb (ABNB) Amazon.com (AMZN) Booking Holdings (BKNG) CarGurus (CARG) Carvana (CVNA) Chewy (CHWY) CoStar Group (CSGP) eBay (EBAY) ETSY (ETSY) Expedia Group (EXPE) Farfetch (FTCH) Mondee Holdings (MOND) Offerpad Solutions (OPAD) Opendoor Technologies (OPEN) PropertyGuru (PGRU) Sonder Holdings (SOND) Vacasa Holdings (VCSA) Warby Parker (WRBY) Xometry (XMTR) Zillow Group (ZG)
Software	Software		
Coverage in Transition (415) 835-8900	Patrick Walravens (415) 835-8943	Aaron Kimson, CFA (415) 835-8944	
Consensus Cloud Solutions, Inc. (CCSI) SPS Commerce (SPSC) Tyler Technologies (TYL) Ziff Davis (ZD)	Adobe Systems (ADBE) Alteryx (AYX) Asana (ASAN) Atlassian Corp. (TEAM) Bandwidth (BAND) BlackLine (BL) Braze (BRZE) C3.ai (AI) Confluent (CFLT) Datadog (DDOG) * DigitalOcean Holdings (DOCN) DocuSign (DOCU)	Domo (DOMO) Dropbox (DBX) EverCommerce (EVCM) Expensify (EXFY) Freshworks (FRSH) Global-E Online (GLBE) Guidewire Software (GWRE) HashiCorp (HCP) Jamf Holding Corp. (JAMF) Kaltura (KLTR) Model N (MODN) MongoDB (MDB)	NICE (NICE) Oracle Corp. (ORCL) Paycor HCM (PYCR) Paylocity Holding Corp. (PCTY) Pegasystems (PEGA) Phreesia (PHR) Procure Technologies (PCOR) Salesforce.com (CRM) SAP (SAP) ServiceNow (NOW) Similarweb (SMWB) Snowflake (SNOW)
			Shopify (SHOP) * Sprinklr (CKM) Teradata Corp. (TDC) Twilio (TWLO) Vertex (VERX) WalkMe (WKME) Workday (WDAY) Zoom Video Communications (ZM) ZoomInfo Technologies (ZI)

Healthcare

Biotechnology & Biopharmaceuticals	Biotechnology & Biopharmaceuticals	Biotechnology & Biopharmaceuticals	
<p>Reni Benjamin, PhD (212) 906-3529</p> <p>Adicet Bio (ACET) Allogene Therapeutics (ALLO) Ambrx Biopharma (AMAM) Bicycle Therapeutics (BCYC) BioAtla (BCAB) Blueprint Medicines Corp. (BPMC) Cue Biopharma (CUE) Deciphera Pharmaceuticals (DCPH) Incyte Corp. (INCY) Inhixrx (INBX) Iovance Biotherapeutics (IOVA) Kura Oncology (KURA) Lava Therapeutics (LVTX) Sana Biotechnology (SANA) Seagen (SGEN) Sutro Biopharma (STRO)</p>	<p>Roy Buchanan, PhD (212) 906-3509</p> <p>Arbutus Biopharma (ABUS) CureVac (CVAC) Dynavax Technologies Corp. (DVAX) Enanta Pharmaceuticals (ENTA) HOOKIPA Pharma (HOOK) PolyPid (PYPD)</p>	<p>Jason Butler, PhD (212) 906-3505</p> <p>ACADIA Pharmaceuticals (ACAD) Aquestive Therapeutics (AQST) argenx (ARGX) Atheta Pharma (ATHA) CorMedix (CRMD) Cytokinetics (CYTK) Esperion Therapeutics (ESPR) Gamida Cell (GMDA) GH Research (GHRG) Halozyme Therapeutics (HALO) Ironwood Pharmaceuticals (IRWD)</p>	<p>Karuna Therapeutics (KRTX) Marinus Pharmaceuticals (MRNS) MorphoSys (MOR) Precigen (PGEN) Prothena Corporation (PRTA) Rezolute (RZLT) Syros Pharmaceuticals (SYRS) Trevena (TRVN) Vigil Neuroscience (VIGL) Viridian Therapeutics (VRDN)</p>
Biotechnology & Biopharmaceuticals	Biotechnology & Biopharmaceuticals	Healthcare Services	Medical Devices & Supplies
<p>Silvan Tuerkcan, PhD (212) 906-3546</p> <p>Benitec Biopharma (BNTC) Collectis (CLLS) CRISPR Therapeutics (CRSP) Exelixis (EXEL) Generation Bio Co. (GBIO) Intellia Therapeutics (NTLA) MacroGenetics (MGNX) Mirati Therapeutics (MRTX) Notable Labs (NTBL) Relay Therapeutics (RLAY) Tayscha Gene Therapies (TSHA) Terns Pharmaceuticals (TERN) Vor Biopharma (VOR)</p>	<p>Jonathan Wolleben (312) 768-1788</p> <p>Allakos (ALLK) Altimmune (ALT) Aura Biosciences (AURA) BioCryst Pharmaceuticals (BCRX) Clearside Biomedical (CLSD) Crinetics Pharmaceuticals (CRNX) DBV Technologies (DBVT) Larimar Therapeutics (LRMR) Madrigal Pharmaceuticals (MDGL) Mirum Pharmaceuticals (MIRM) Ocular Therapeutix (OCUL) Pharvaris (PHVS) ProQR Therapeutics (PRQR) Protagonist Therapeutics (PTGX) Rallybio Corp. (RLYB) Sagimet Biosciences (SGMT) Spruce Biosciences (SPRB) Structure Therapeutics (GPCR)</p>	<p>Constantine Davides (617) 235-8508</p> <p>agilon health (AGL) AMN Healthcare Services (AMN) Cross Country Healthcare (CCRN) Evolent Health (EVH) HealthStream (HSTM) Privia Health Group (PRVA)</p>	<p>David Turkaly (212) 906-3563</p> <p>Daniel Stauder, CFA (212) 906-3535</p> <p>AtriCure (ATRC) Avanos Medical (AVNS) AxoGen (AXGN) Apyx Medical Corp. (APYX) Globus Medical (GMED) Haemonetics Corp. (HAE) Integra LifeSciences Holdings (IART) Lantheus Holdings (LNTH) LeMaitre Vascular (LMAT) Neuronetics (STIM) Nevro Corp. (NVRO) Orthofix International (OFIX) OrthoPediatrics Corp. (KIDS) Paragon 28 (FNA) SI-BONE (SIBN) STERIS Corp. (STE) Stryker Corp. (SYK) TELA Bio (TELA) Teleflex (TFX) Zimmer Biomet Holdings (ZBH)</p>

Financial Services

Alternative Asset Managers	Commercial Finance (BDCs)	Commercial Mortgage REITs	Commercial Real Estate Finance	Consumer Finance	Financial Technology
<p>Brian McKenna (212) 906-3545 Devin Ryan (212) 906-3578</p> <p>Apollo Global Management (APO) Ares Management Corporation (ARES) Blackstone (BX) Blue Owl Capital (OWL) The Carlyle Group (CG) FTAI Aviation (FTAI) KKR & Co. (KKR) TPG (TPG)</p>	<p>Brian McKenna (212) 906-3545 Devin Ryan (212) 906-3578</p> <p>Ares Capital Corp. (ARCC) BlackRock TCP Capital Corp. (TCPC) Blue Owl Capital Corp. (OBDC) Capital Southwest Corp. (CSWC) Hercules Capital (HTGC) Monroe Capital Corp. (MRCC) Oaktree Specialty Lending Corp. (OCSL) PennantPark Floating Rate Capital (PFLT) PennantPark Investment Corp. (PNNT) Sixth Street Specialty Lending (TSLX) SuRo Capital Corp. (SSSS) TriplePoint Venture Growth BDC Corp. (TPVG)</p>	<p>Steven DeLaney (212) 906-3517 Chris Muller (212) 906-3559</p> <p>ACRES Commercial Realty Corp. (ACR) AFC Gamma (AFCG) * Apollo Commercial Real Estate Finance (ARI) Arbor Realty Trust (ABR) Ares Commercial Real Estate Corp. (ACRE) Blackstone Mortgage Trust (BXMT) BrightSpire Capital (BRSP) Chicago Atlantic Real Estate Finance (REFI) * Claros Mortgage Trust (CMTG) Franklin BSP Realty Trust (FBRT) Granite Point Mortgage Trust (GPMT) Greystone Housing Impact Investors (GHI) KKR Real Estate Finance Trust (KREF) Ladder Capital Corp. (LADR) Lument Finance Trust (LFT) NexPoint Real Estate Finance (NREF) Ready Capital Corporation (RC) Sachem Capital Corp. (SACH) Seven Hills Realty Trust (SEVN) Starwood Property Trust (STWD) TPG RE Finance Trust (TRTX)</p>	<p>Steven DeLaney (212) 906-3517 Chris Muller (212) 906-3559</p> <p>Walker & Dunlop (WD) Velocity Financial (VEL)</p>	<p>David Scharf (415) 835-8942</p> <p>Atlantius Holdings Corp. (ATLC) Bread Financial Holdings, Inc. (BFH) Encore Capital Group (ECPG) OneMain Holdings (OMF) Opportun Financial Corp. (OPRT) PRA Group (PRAA) Regional Management Corp. (RM) Synchrony Financial (SYF) Upstart Holdings (UPST)</p>	<p>Consumer FinTech <i>David Scharf; Devin Ryan; Andrew Boone</i> Enova International (ENVA) Open Lending Corp. (LPRO) OppFi (OPFI) MarketWise (MKTW) Robinhood Markets (HOOD)</p> <p>Digital Assets <i>Devin Ryan</i> Coinbase Global (COIN)</p> <p>Enterprise FinTech <i>Devin Ryan; Pat Walravens</i> Alkami Technology (ALKT) Envestnet (ENV)</p> <p>InsurTech <i>Matthew Carletti; Andrew Boone</i> Doma Holdings (DOMA) * Hippo Holdings Inc. (HIPO) * Lemonade (LMND) * Root (ROOT) *</p> <p>PaymentTech <i>David Scharf</i> Block (SQ) International Money Express (IMX) Pagaya Technologies (PGY) PayPal Holdings (PYPL) Remity Global (RELY) The Western Union Company (WU)</p>
Insurance	Investment Banks & Brokers	Residential Mortgage REITs & Mortgage Operating Companies			
<p>Matthew Carletti (312) 768-1784</p> <p>The Allstate Corp. (ALL) AMERISAFE (AMSF) Arch Capital Group (ACGL) Argo Group International Holdings (ARGO) AXIS Capital Holdings (AXS) Chubb (CB) Employers Holdings (EIG) Fidelis Insurance Holdings (FIHL) Goosehead Insurance (GSHD) Hamilton Insurance Group (HG) The Hanover Insurance Group (THG) HCI Group (HCI) Heritage Insurance Holdings (HRTG) Horace Mann Educators Corp. (HMN)</p>	<p>Devin Ryan (212) 906-3578 Brian McKenna (212) 906-3545</p> <p>The Charles Schwab Corp. (SCHW) Evercore (EVR) Forge Global Holdings (FRGE) The Goldman Sachs Group (GS) Greenhill & Co. (GHL) Houlihan Lokey (HL) Lazard (LAZ) LPL Financial Holdings (LPLA) Moelis & Company (MC) Morgan Stanley (MS) Perella Weinberg Partners (PWP) Piper Sandler Companies (PIPR) PJT Partners (PJT) Raymond James Financial (RJF) Stifel Financial Corp. (SF)</p>	<p>Steven DeLaney (212) 906-3517 Trevor Cranston, CFA (415) 869-4431 Mikhail Goberman (212) 906-3543</p> <p>AG Mortgage Investment Trust (MITT) AGNC Investment Corp. (AGNC) Annaly Capital Management (NLY) Arlington Asset Investment Corp. (AAIC) ARMOUR Residential REIT (ARR) Cherry Hill Mortgage Investment Corp. (CHMI) Chimera Investment Corp. (CIM) Dynex Capital (DX) Ellington Financial (EFC) Ellington Residential Mortgage REIT (EARN) Great Ajax Corp. (AJX)</p> <p>Guid Holdings Company (GHL) Invesco Mortgage Capital (IVR) loanDepot (LDI) MFA Financial (MFA) Orchid Island Capital (ORC) PennyMac Financial Services (PFSI) PennyMac Mortgage Investment Trust (PMT) Redwood Trust (RWT) Rithm Capital Corp. (RITM) Two Harbors Investment Corp. (TWO) UWM Holdings Corporation (UWMC)</p>			

Real Estate

Equity REITs	Equity REITs	Real Estate Services	Residential Real Estate
Aaron Hecht (415) 835-3963	Mitch Germain (212) 906-3537	Coverage in Transition (415) 835-8900	Aaron Hecht (415) 835-3963
AFC Gamma (AFCG) * Alexandria Real Estate Equities (ARE) American Homes 4 Rent (AMH) BRT Apartments Corp. (BRT) Chicago Atlantic Real Estate Finance (REFI) * Clipper Realty (CLPR) Diversified Healthcare Trust (DHC) Essex Property Trust (ESS) Global Medical REIT (GMRE) Independence Realty Trust (IRT) Innovative Industrial Properties (IIPR) Invitation Homes (INVH) LTC Properties (LTC) Mid-America Apartment Communities (MAA) NexPoint Residential Trust (NXRT) Omega Healthcare Investors (OHI) Physicians Realty Trust (DOC) Sabra Healthcare REIT (SBRA) Sun Communities (SUJ)	Agree Realty Corp. (ADC) Alexander & Baldwin (ALEX) Broadstone Net Lease (BNL) EPR Properties (EPR) Gaming & Leisure Properties (GLPI) * Getty Realty Corp. (GTY) Global Net Lease (GNL) Industrial Logistics Properties Trust (ILPT) LXP Industrial Trust (LXP) Orion Office REIT (ONL) Plymouth Industrial REIT (PLYM) Spirit Realty Capital (SRC) Terreno Realty Corp. (TRNO) VICI Properties (VICI) * W.P. Carey (WPC) Whitestone REIT (WSR)	Kennedy-Wilson Holdings (KW)	D.R. Horton (DHI) Green Brick Partners (GRBK) Lennar Corp. (LEN) LGI Homes (LGIH)

Consumer

Gaming, Online Gaming & Gaming Technology

Jordan Bender
(212) 906-3526

Bally's Corp. (BALY)
Boyd Gaming Corp. (BYD)
Bragg Gaming Group (BRAG)
Century Casinos (CNTY)
Churchill Downs (CHDN)
DraftKings (DKNG)
Flutter Entertainment (FLTR)
Full House Resorts (FLL)
Gaming & Leisure Properties (GLPI) *
Genius Sports (GENI)
Golden Entertainment (GDEN)
Inspired Entertainment (INSE)
MGM Resorts International (MGM)
PENN Entertainment (PENN)
PlayAGS (AGS)
Red Rock Resorts (RRR)
Rush Street Interactive (RSI)
Sportradar Group (SRAD)
VICI Properties (VICI) *

Industrials

Aerospace & Defense

Trevor Walsh
(415) 835-3934

Planet Labs (PL)
V2X (VVX)