

## Technology

Communications Equipment & IT Infrastructure	Cybersecurity	Internet	Internet
Erik Suppiger (415) 835-3918  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)	Trevor Walsh (415) 835-3934  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)	Andrew Boone (415) 835-3902  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) Nexxen International (NEXN) ODDITY Tech (ODD) Outbrain (OB)	Nicholas Jones (212) 906-3528  Peloton Interactive (PTON) PubMatic (PUBM) Rent the Runway (RENT) Rover Group (ROVR) Shopify (SHOP) * Shutterstock (SSTK) Snap (SNAP) Squarespace (SQSP) Taboola.com (TBLA) 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) 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	Software	
Coverage in Transition (415) 835-8900  Consensus Cloud Solutions, Inc. (CCSI) SPS Commerce (SPSC) Ziff Davis (ZD)	Aaron Kimson, CFA (415) 835-8944  EverCommerce (EVCM) Expensify (EXFY) Guidewire Software (GWRE) Model N (MODN) Procore Technologies (PCOR)	Patrick Walravens (415) 835-8943  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)	Freshworks (FRSH) Global-E Online (GLBE) HashiCorp (HCP) Jamf Holding Corp. (JAMF) Kaltura (KLTR) MongoDB (MDB) NICE (NICE) Oracle Corp. (ORCL) Paycor HCM (PYCR) Paylocity Holding Corp. (PCTY) Pegasystems (PEGA) Phreesia (PHR) Salesforce.com (CRM) SAP (SAP)  ServiceNow (NOW) Similarweb (SMWB) Snowflake (SNOW) Shopify (SHOP) * Sprinklr (CXM) 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	
Reni Benjamin, PhD (212) 906-3529  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) Inhibrx (INBX) Iovance Biotherapeutics (IOVA) Kura Oncology (KURA) Lava Therapeutics (LVTX) Sana Biotechnology (SANA) Sutro Biopharma (STRO)	Roy Buchanan, PhD (212) 906-3509  AN2 Therapeutics (ANTX) Arbutus Biopharma (ABUS) CureVac (CVAC) Dynavax Technologies Corp. (DVAX) Enanta Pharmaceuticals (ENTA) HOOKIPA Pharma (HOOK) Inovio Pharmaceuticals (INO) PolyPid (PYPD)	Jason Butler, PhD (212) 906-3505  ACADIA Pharmaceuticals (ACAD) Aquestive Therapeutics (AQST) argenx (ARGX) Athira Pharma (ATHA) CorMedix (CRMD) Cytokinetics (CYTK) Esperion Therapeutics (ESPR) Gamida Cell (GMDA) GH Research (GHRS) Halozyme Therapeutics (HALO) Ironwood Pharmaceuticals (IRWD)	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)
Biotechnology & Biopharmaceuticals	Biotechnology & Biopharmaceuticals	Healthcare Services	Medical Devices & Supplies
Silvan Tuerkcan, PhD (212) 906-3546  Benitec Biopharma (BNTC) Cellectis (CLLS) CRISPR Therapeutics (CRSP) Exelixis (EXEL) Generation Bio Co. (GBIO) Intellia Therapeutics (NTLA) MacroGenetics (MGNX) Notable Labs (NTBL) Relay Therapeutics (RLAY) Taysha Gene Therapies (TSHA) Terns Pharmaceuticals (TERN) Vor Biopharma (VOR)	Jonathan Wolleben (312) 768-1788  Allakos (ALLK) Altimune (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) Savara (SVRA) Spruce Biosciences (SPRB) Structure Therapeutics (GPCR)	Constantine Davides (617) 235-8508  agilon health (AGL) AMN Healthcare Services (AMN) Cross Country Healthcare (CCRN) Evolent Health (EVH) HealthStream (HSTM) Privia Health Group (PRVA)	David Turkaly (212) 906-3563  Daniel Stauder, CFA (212) 906-3535  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)

## Financial Services

Alternative Asset Managers	Commercial Finance (BDCs)	Commercial Mortgage REITs	Commercial Real Estate Finance	Consumer Finance	Financial Technology
<p>Brian McKenna      Devin Ryan (212) 906-3545      (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 &amp; Co. (KKR) TPG (TPG)</p>	<p>Brian McKenna      Devin Ryan (212) 906-3545      (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) Nuveen Churchill Direct Lending Corp. (NCDL) Oaktree Specialty Lending Corp. (OCSL) PennantPark Floating Rate Capital (PFLT) PennantPark Investment Corp. (PNNT) Sixth Street Specialty Lending (TS LX) SuRo Capital Corp. (SSSS) TriplePoint Venture Growth BDC Corp. (TPVG)</p>	<p>Steven DeLaney      Chris Muller (212) 906-3517      (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) Safehold (SAFE) * Seven Hills Realty Trust (SEVN) Starwood Property Trust (STWD) TPG RE Finance Trust (TRTX)</p>	<p>Steven DeLaney      Chris Muller (212) 906-3517      (212) 906-3559</p> <p>Walker &amp; 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><b>Consumer FinTech</b> <i>David Scharf, Devin Ryan, Andrew Boone</i> Enova International (ENVA) Open Lending Corp. (LPRO) OppFi (OPFI) MarketWise (MKTW) Robinhood Markets (HOOD)</p> <p><b>Digital Assets</b> <i>Devin Ryan</i> Coinbase Global (COIN)</p> <p><b>Enterprise FinTech</b> <i>Devin Ryan, Pat Walravens</i> Alkami Technology (ALKT) Envestnet (ENV)</p> <p><b>InsurTech</b> <i>Matthew Carletti, Andrew Boone</i> Doma Holdings (DOMA) * Hippo Holdings Inc. (HIPO) * Lemonade (LMND) * Root (ROOT) *</p> <p><b>PaymentTech</b> <i>David Scharf</i> Block (SQ) International Money Express (IMX) Pagaya Technologies (PGY) PayPal Holdings (PYPL) Remitty Global (RELY) The Western Union Company (WU)</p>
<p><b>Insurance</b></p> <p>Matthew Carletti (312) 768-1784</p> <p>The Allstate Corp. (ALL) AMERISAFE (AMSF) Arch Capital Group (ACGL) 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>James River Group Holdings (JRVR) Kemper Corp. (KMPR) Kinsale Capital Group (KNSL) Old Republic International Corp. (ORI) Palomar Holdings (PLMR) ProAssurance Corp. (PRA) RenaissanceRe Holdings (RNR) RLI Corp. (RLI) Ryan Specialty Holdings (RYAN) Selective Insurance Group (SIGI) Skyward Specialty Insurance Group (SKWD) The Travelers Companies (TRV)</p>	<p><b>Investment Banks &amp; Brokers</b></p> <p>Devin Ryan      Brian McKenna (212) 906-3578      (212) 906-3545</p> <p>The Charles Schwab Corp. (SCHW) Evercore (EVR) Forge Global Holdings (FRGE) The Goldman Sachs Group (GS) Houlihan Lokey (HLI) Lazard (LAZ) LPL Financial Holdings (LPLA) Moelis &amp; 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><b>Residential Mortgage REITs &amp; Mortgage Operating Companies</b></p> <p>Steven DeLaney      Trevor Cranston, CFA      Mikhail Goberman (212) 906-3517      (415) 869-4431      (212) 906-3543</p> <p>AG Mortgage Investment Trust (MITT) AGNC Investment Corp. (AGNC) Annaly Capital Management (NLY) 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) Guild Holdings Company (GHLD)</p> <p>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	Real Estate Services	Residential Real Estate
<p>Aaron Hecht (415) 835-3963</p> <p>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 (SUI)</p>	<p>Mitch Germain (212) 906-3537</p> <p>Agree Realty Corp. (ADC)                      Alexander &amp; Baldwin (ALEX)                      Broadstone Net Lease (BNL)                      EPR Properties (EPR)                      Gaming &amp; 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)                      Safehold (SAFE) *                      Terreno Realty Corp. (TRNO)                      VICI Properties (VICI) *                      W.P. Carey (WPC)                      Whitestone REIT (WSR)</p>	<p>Aaron Hecht (415) 835-3963</p> <p>Hilton Grand Vacations (HGV)                      Marriott Vacations Worldwide Corp. (VAC)                      Travel + Leisure Co. (TNL)</p>	<p>Coverage in Transition (415) 835-8900</p> <p>Kennedy-Wilson Holdings (KW)</p>	<p>Aaron Hecht (415) 835-3963</p> <p>D.R. Horton (DHI)                      Green Brick Partners (GRBK)                      Lennar Corp. (LEN)                      LGI Homes (LGIH)</p>

## Consumer

### Gaming, Online Gaming & Gaming Technology

Jordan Bender  
(212) 906-3526

Bally's Corp. (BALY)  
Boyd Gaming Corp. (BYD)  
Bragg Gaming Corp (BRAG)  
Caesars Entertainment (CZR)  
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

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Aerospace & Defense

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Trevor Walsh  
(415) 835-3934

Planet Labs (PL)  
Tyler Technologies (TYL)  
V2X (VXX)