

TUE 12/12: 145pm **Tech/Internet** (Tax reform, Tech M&A, AI / Machine Learning, Cloud/Datacenter, SaaS, Video Games, Semis (peak?, M&A, silicon carbide/CREE), AAPL, mobile video, ADAS, Auto Tech, industrial tech/robotics, 5G, SDN, Mobile Payments, blockchain/crypto etc)

THUR 12/14: 12pm **Consumer**

THUR 12/14: 12pm **Media/Telco**

FRI 12/15: 12pm **Healthcare**

MON 12/18: Energy

TUE 12/19: Financials