

## Wednesday November 11, 2009

Central Standard Time		Presenting Rooms		
		Madrid	Manchester	Milan
11/11 Registration & Breakfast	7:30 to 8:30 AM			
Company Presentations	8:30 to 9:05	American Water Works Co., Inc. (NYSE: AWK)		
Company Presentations	9:15 to 9:50	Sparton Corp. (NYSE: SPA)	Rent-A-Center, Inc. (Nasdaq: RCII)	
Company Presentations	10:00 to 10:35	Dynex Capital (NYSE: DX)	John B Sanfilippo & Son, Inc. (Nasdaq: JBSS)	
Company Presentations	10:45 to 11:20	Advance America Cash Advance, Inc. (NYSE: AEA)	Image Sensing Systems, Inc. (Nasdaq: ISNS)	
Company Presentations	11:30 to 12:05	Emergent BioSolutions, Inc. (NYSE: EBS)	Sport Supply Group, Inc. (Nasdaq: RBI)	Active Power, Inc. (Nasdaq: ACPW)
Lunch Presentation	12:15 to 1:30	Lunch Program - Morningstar's Alex Morozov, CFA "Healthcare Investing Landscape" Sponsored by Capital Institutional Services		
Company Presentations	1:40 to 2:15	Panhandle Oil and Gas, Inc. (NYSE: PHX)	A.T. Cross Co. (Nasdaq: ATX)	
Company Presentations	2:25 to 3:00	Cinemark Holdings, Inc. (NYSE: CNK)	Hudson Highland Group, Inc. (Nasdaq: HHGP)	
Company Presentations	3:10 to 3:45	Capstead Mortgage Corp. (NYSE: CMO)	Uranium Energy Corp. (AMEX: UEC)	
Company Presentations	3:55 to 4:30	Cleco Corp. (NYSE: CNL)	Park City Group, Inc. (OTC BB: PCYG)	
Cocktail Reception	4:30 to 6:00	Social Networking Event - Sponsored by Three Part Advisors, LLC		

## Thursday November 12, 2009

Central Standard Time		Presenting Rooms		
		Madrid	Manchester	Milan
11/12 Registration & Breakfast	7:30 to 8:30 AM			
	7:45 to 8:20	Mike Carney, Three Part Advisors "Macro Industry Perspective"		
Company Presentations	8:30 to 9:05	Tix Corp. (Nasdaq: TIXC)		
Company Presentations	9:15 to 9:50		PowerSecure International, Inc. (Nasdaq: POWR)	SuperGen Inc. (Nasdaq: SUPG)
Company Presentations	10:00 to 10:35	Deltic Timber, Corp. (NYSE: DEL)	Answers Corporation (Nasdaq: ANSW)	
Company Presentations	10:45 to 11:20	Encore Wire Corp. (Nasdaq: WIRE)	IntegraMed America, Inc. (Nasdaq: INMD)	
Company Presentations	11:30 to 12:05	Macquarie Infrastructure Co. (NYSE: MIC)	XETA Technologies, Inc. (Nasdaq: XETA)	
Lunch Presentation	12:15 to 1:30	Lunch Program - Guest Speaker John Mauldin "Thoughts from the Frontline" - <a href="http://www.johnmauldin.com">www.johnmauldin.com</a> Sponsored by InvestorsInsight.com		
Company Presentations	1:40 to 2:15		R.G. Barry Corporation (Nasdaq: DFZ)	Tandy Leather Factory, Inc. (AMEX: TLF)
Company Presentations	2:25 to 3:00	RSC Holdings, Inc. (NYSE: RRR)	LodgeNet Interactive Corp. (Nasdaq: LNET)	
Company Presentations	3:10 to 3:45	Tempur-Pedic International, Inc. (NYSE: TPX)		

  
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**2009 Presenting Companies**

Company	Ticker	Headquarters Location	Market Cap	Share Price	Div Yield	TTM EPS	P/E	Price/Book	Price/Sales	TTM EBITDA
Active Power, Inc.	ACPW	Austin, TX	73.61M	1.11	N/A	-0.15	N/A	5.2	2.0	-7.32M
Advance America Cash Advance, Inc.	AEA	Spartanburg, SC	303.31M	4.92	5%	0.59	8	1.6	0.5	95.63M
American Water Works Co., Inc.	AWK	Voorhees, NJ	3.35B	19.18	4%	-1.47	15	0.9	1.4	895.05M
Answers Corp.	ANSW	New York, NY	82.18M	10.37	N/A	-0.779	N/A	5.5	4.8	4.54M
A.T. Cross Company	ATX	Lincoln, RI	58.46M	4.01	N/A	-0.21	36	0.8	0.4	9.76M
Capstead Mortgage Corp.	CMO	Dallas, TX	845.26M	12.99	17%	2.02	6	1.1	5.4	N/A
Cinemark Holdings, Inc.	CNK	Plano, TX	1.23B	11.28	6%	-0.305	19	1.5	0.7	370.01M
Cleco Corp.	CNL	Pineville, LA	1.51B	24.94	4%	1.4	15	1.4	1.5	242.39M
Deltic Timber Corp.	DEL	El Dorado, AR	609.93M	49.03	1%	0.17	123	2.9	5.1	12.35M
Dynex Capital, Inc.	DX	Glen Allen, VA	110.28M	8.13	11%	0.56	N/A	1.0	7.1	N/A
Emergent BioSolutions, Inc.	EBS	Rockville, MD	435.44M	14.3	N/A	1.22	15	2.0	2.0	64.50M
Encore Wire Corp.	WIRE	McKinney, TX	496.24M	21.57	0%	0.96	72	1.3	0.8	48.63M
Hudson Highland Group, Inc.	HHGP	New York, NY	101.29M	3.81	N/A	-4.08	N/A	1.1	0.1	-12.22M
Image Sensing Systems, Inc.	ISNS	St. Paul, MN	48.98M	12.29	N/A	1.02	N/A	1.6	2.0	7.03M
IntegraMed America, Inc.	INMD	Purchase, NY	75.06M	8.6	N/A	0.46	18	1.4	0.4	14.87M
John B Sanfilippo & Son Inc.	JBSS	Elgin, IL	147.72M	13.91	N/A	0.65	N/A	0.9	0.3	29.78M
LodgeNet Interactive Corp.	LNET	Sioux Falls, SD	105.75M	4.68	N/A	-1.23	N/A	N/A	0.2	121.67M
Macquarie Infrastructure Co.	MIC	New York, NY	355.20M	7.9	N/A	-5.936	4	0.6	0.4	158.16M
Panhandle Oil and Gas, Inc.	PHX	Oklahoma City, OK	163.01M	19.64	1%	0.72	N/A	2.6	3.4	37.12M
Park City Group, Inc.	PCYG	Park City, UT	28.66M	2.7	N/A	-0.48	N/A	N/A	5.3	-1.51M
PowerSecure International, Inc	POWR	Wake Forest, NC	154.09M	8.95	N/A	0.2	60	2.3	1.6	3.74M
Rent-A-Center, Inc.	RCII	Plano, TX	1.25B	18.87	N/A	2.29	8	1.0	0.4	350.92M
R.G. Barry Corporation	DFZ	Pickerington, OH	90.60M	8.45	N/A	0.65	9	2.0	0.8	11.46M
RSC Holdings, Inc.	RRR	Scottsdale, AZ	741.46M	7.17	N/A	0.34	N/A	24.8	0.5	322.91M
Spartan Corp.	SPA	Jackson, MI	41.79M	4.2	N/A	-1.606	N/A	0.8	0.2	-1.82M
Sport Supply Group, Inc	RBI	Farmers Branch, TX	125.29M	10.1	1%	0.86	11	1.4	0.5	23.77M
SuperGen, Inc.	SUPG	Dublin, CA	143.74M	2.43	N/A	-0.03	N/A	1.6	3.7	2.96M
Tandy Leather Factory, Inc.	TLF	Fort Worth, TX	34.98M	3.28	N/A	0.26	N/A	1.1	0.7	5.58M
Tempur-Pedic International, Inc.	TPX	Lexington, KY	1.43B	19.12	N/A	0.76	19	10.8	2.0	154.48M
Tix Corp	TIXC	Studio City, CA	106.36M	3.28	N/A	-1.01	N/A	4.8	1.5	3.71M
Uranium Energy Corp.	UEC	Austin, TX	149.19M	2.63	N/A	-0.28	N/A	4.3	N/A	-11.82M
XETA Technologies, Inc.	XETA	Broken Arrow, OK	26.07M	2.55	N/A	-0.75	N/A	0.8	0.3	3.70M

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