



Thursday, July 25th, 2024

SESSION 1 – Industrial Policy & Trade

12:00pm - 1:00pm	<i>Lunch</i>
1:00pm - 1:50pm	"Who Benefits from the Export-Import Bank Aid ?" by Efraim Benmelech (Presenter) and Joao Monteiro
1:50pm - 2:10pm	<i>Break</i>
2:10pm - 3:00pm	"EXIM's Exit: The Real Effects of Trade Financing by Export Credit Agencies" by Adrien Matray (Presenter), Karsten Mueller , Chenzi Xu , and Poorya Kabir
3:00pm - 3:20pm	<i>Break</i>
3:20pm - 4:10pm	"Buy American Restrictions on Government Purchases: Implications for U.S. Manufacturing" by Miguel Acosta and Lydia Cox (Presenter)
4:10pm - 4:30pm	<i>Break</i>
4:30pm - 5:20pm	"The Exchange Rate as an Industrial Policy" by Pablo Ottonello (Presenter), Diego Perez , and William Witheridge
5:20pm - 7:30pm	<i>Dinner (Location TBD)</i>

Friday, July 26th, 2024

SESSION 2 – Role of Tariff and Exchange Rates on Credit and Capital Accumulation

7:30am - 8:15am	<i>Breakfast</i>
8:15am - 9:05am	"Trade Protection, Stock Market Returns and Welfare" by Matthieu Gomez (Presenter), Sang Hoon Kong , David Weinstein , and Mary Amity
9:05am - 9:30am	<i>Break</i>
9:30am - 10:20am	"Trade Uncertainty and U.S. Bank Lending" by Ricardo Correa , Julian di Giovanni , Camelia Minoiu , and Linda Goldberg (Presenter)
10:20am - 10:40am	<i>Break</i>
10:40am - 11:30am	"The Causal Effects of Expected Future Depreciations" by Martha Elena , Marc Hofstetter , Mathieu Pedemonte , and Juan Herreno (Presenter)
11:30am - 11:50am	<i>Break</i>
11:50am - 12:40pm	"Bank Financing of Global Supply Chains" by Camelia Minoiu (Presenter)
12:40pm - 1:40pm	<i>Lunch</i>
1:40pm - 2:30pm	"Granular Corporate Hedging Under Dominant Currency" by Laura Alfaro , Liliana Varela (Presenter), and Mauricio Calani
2:30pm - 2:50pm	<i>Break</i>

SESSION 3 – Industry Linkages, Supply Chains & Trade

2:50pm - 3:40pm	"Industry Linkages from Joint Production" by Xiang Ding (Presenter)
3:40pm - 4:00pm	<i>Break</i>
4:00pm - 4:50pm	"Weathering the Storm: Supply Chains and Climate Risk" by Juanma Castro-Vincenzi (Presenter), Gaurav Khanna , Nicolas Morales , and Nitya Pandalai-Nayar
4:50pm - 5:10pm	<i>Break</i>
5:10pm - 6:00pm	" Navigating the Waves of Global Shipping: Drivers and Aggregate Implications" by Fernando Leibovici (Presenter), and Jason Dunn
6:00pm - 7:30pm	<i>Unofficial Dinner</i>

Co-Sponsored by the Stanford Graduate School of Business and the Stanford Institute for Theoretical Economics (SITE)

Organized by Juliane Begenau, Linda Goldberg, Adrien Matray, and Chenzi Xu