

Stockman Conference 2026

Conference Program

September 24–26, 2026 • University of Rochester

Thursday, September 24

7:30 p.m. — Pre-Conference Dinner

Location to be confirmed

Friday, September 25

8:45–9:15 a.m. — Refreshments

9:15–9:25 a.m. — Opening Remarks

9:25–10:15 a.m. — Session I: Macro-Finance and Monetary Transmission

João Pedro Rudge Leite — *"A Model of Bank Failures: Funding Frictions and the Dynamics Before Collapse"*

Chang Liu — *"Dollar Debt and Monetary Policy Transmission in Emerging Markets"*

With Minjie Deng, Junhyong Kim, Annie Soyeon Lee

10:15–10:40 a.m. — Coffee Break

10:40–11:55 a.m. — Session II: Tariffs and Trade Dynamics

Shafaat Yar Khan — *"Supply Chain Recessions"*

Armen Khederlarian — *"Trade Policy Duration and Dynamic Adjustment"*

Carter Mix — *"Optimal Tariff with Trade Dynamics"*

11:55 a.m.–1:15 p.m. — Lunch

1:15–2:05 p.m. — Session III: Firms, Innovation, and Market Power

Kai-Jie Wu — *"Risk and Price: The Role of Inventories and Market Power"*

With Maria-Jose Carreras-Valle and Conor Ryan

Kyeongmin Park — *"Product Innovation, Marketing and the Gains from AI"*

2:05–2:50 p.m. — Group Photo and Coffee

2:50–4:05 p.m. — Session IV: Trade, Informality, and Structural Adjustment

Oscar Avila — *"Terms of Trade and Informality"*

Paulo Lins — *"Wedge-Accounting in Multi-Sector Models"*

With Eugenio González Flores and Gian Paulo Soave

Marcos Mac Mullen — *"Trade Wars: The Empire Strike Back"*

With Armen Khederlarian and Roman Merga

4:05–4:25 p.m. — Coffee Break

4:25–5:25 p.m. — Plenary: Baris Kaymak

6:00 p.m. — Soccer or evening run

8:00 p.m. — Conference Dinner (location TBD)

Saturday, September 26

9:00–9:25 a.m. — Refreshments

9:25–10:40 a.m. — Session V: Migration, Family, and Health

Stepan Gordeev — *"The Macroeconomic Effects of Lifting Barriers to Migration"*

With Travis Baseler

Shirley Yu-Hsuan Yen — *"Cats, Dogs, and Babies: Quasi-Experimental Evidence on Substitutes or Complements from Linked Administrative Records"*

David Slichter — *"Part-Time Work Might Be Best for Health: Evidence Using Bunching"*

With Héctor Ormeño

10:40–11:00 a.m. — Coffee Break

11:00–11:50 a.m. — Session VI: Education, Gender, and Development

Charles Ka Yui Leung — *"Gender Income Gap vs. Gender Welfare Gap: The Role of College Majors and Education Policy"*

With C. Y. Kelvin Yuen

Zibin Huang — *"Education Policy, Family Migration, and Service Sector Growth in China"*

With Naijia Guo, Zibin Huang, Ming Lu, Xican Xi, and Yuejun Zhong

11:50 a.m.–1:15 p.m. — Lunch

1:15–2:15 p.m. — Plenary: Geni Dechter

2:15 p.m. — Conference Adjourns