FEDERAL RESERVE BANK OF SAN FRANCISCO

SF FED WORKSHOP ON EXPECTATIONS AND BEHAVIORAL MACROECONOMICS

November 2, 2026

9:00 a.m.	Welcome and breakfast
9:30 a.m.	"Spend What You Learn: Heterogeneous Agents, Sentiments, and Aggregate Demand" **Adrien Auclert (Stanford)**, Hugo Monnery, Matthew Rognile, Ludwig Straub
10:20 a.m.	Break
10:35 a.m.	"Intertemporal Network with Incomplete Information" **Zhen Huo (Yale University)**
11:25 a.m.	Break
11:40 a.m.	"Using density forecasts to measure the stability of inflation expectations" Ian Dew-Becker, Stefano Giglio, **Pooya Molavi (Northwestern University)**
12:30 p.m.	Lunch
2:00 p.m.	TBD **Ulrike Malmendier (UC Berkeley)**
2:50 p.m.	Break
3:05 p.m.	"Forecasting with Uncertain Persistence" **Joel P. Flynn (Yale University)**, Maksim Meinert, Karthik A. Sastry
3:55 p.m.	Break
4:10 p.m.	"Asset Prices with Non-rational Expectations: Macroeconomic Implications" Yunpeng Deng, **Stefano Eusepi (UT Austin)**, Marc Giannoni, Bruce Preston

Workshop organizers: Timo Reinelt, Sanjay R. Singh, Yeji Sung