Semiconductor Investment Ideas

Long *(l)*	***Long but Distressed*** *(d)*	***Long--But Upside Incremental*** *(ui)*	***Not Compelling Long or Short*** *(nc)*	
AMD	ANAD	IDTI	ACTS	MTSI
EXAR	BCDS	INTC	ADI	MXL
ISSI	CODE	IRF	ALTR	NLST
IXYS	DSPG	ISIL	AMCC	NPTN
MU	FSL	LSCC	AOSL	NXPI
OIIM	GSIT	MCRL	ATML	ONNN
OVTI	HIMX	MRVL	AUTH	POWI
PSEM	IKAN	MXIM	AVGO	QCOM
RFMD	MX	NVDA	BRCM	QUIK
RMBS	PXLW	PLXT	CRUS	SIGM
STM	RMTR	PMCS	CY	SIMG
TQNT	SPWR	QLGC	DIOD	SIMO
TSEM	VIMC	SNDK	ENTR	SLAB
VSH	VTSS	TSRA	FCS	SMI
			GGOX	SMSC
Short *(s)*			HITT	SMTC
CAVM			IDCC	SPRD
CEVA			INFN	SQNS
EZCH			IPHI	STEC
INVN			LLTC	SUPX
MLNX			LSI	SWKS
			MCHP	TSM
			MEMS	TXCC
			MIPS	TXN
			MOSY	UMC
(x) = change from prior week			MPWR	VLTR
			MSCC	XLNX

—Dan K. Scovel
Semiconductor Analyst

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