

Semiconductor Investment Ideas

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

(x) = change from 6/9/13

—Dan K. Scovel
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