

## 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>	
HIMX	ACTS	BRCM	ADI	MSCC
MU	ADNC	CRUS	ALTR	MTSI
OVTI	AMD	CY	AMBA	MXIM
QLGC	ANAD	FCS	AMCC	MXL
SIMG	AOSL	INTC	ATML	NVDA
	CODE	IXYS	AVGO	NXPI
	DSPG	MONT (nc)	CEVA	ONNN
	FSL	PLXT	DIOD	PMCS
	GIG	PSEM	ENTR	POWI
	IKAN	SIMO	EXAR	QCOM
	MX	SMTC	EZCH	QUIK
<u>Short (s)</u>	NLST	VSH	GSIT	RFMD
CAVM	NPTN		HITT	RMBS
INVN	OIIM		IDCC	SLAB
MOSY	PSMI		IDTI	SMI
MPWR	PXLW		INFN (ui)	SNDK
	SIGM		IPHI	SPWR
	SQNS (nc)		IRF	SWKS
	STM		ISIL	TQNT
	TSEM		ISSI	TSM
	VIMC		LLTC	TSRA
			LSCC	TXN
			MCHP	UMC
			MCRL	VTSS
			MLNX	XLNX
			MRVL	

( x ) = change from 5/11/14

—Dan K. Scovel  
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