

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

( x ) = change from 5/26/14

—Dan K. Scovel  
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