

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

(x) = change from 10/26/14

—Dan K. Scovel
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