Semiconductor Investment Ideas

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

—Dan K. Scovel
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