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	ANAD	BRCM	ACTS	MXL
EXAR	AOSL	IDTI	ADI	NETL
ISIL	BCDS	INTC	ALTR	NLST
ISSI	CODE	IRF	AMCC	NXPI *(d)*
IXYS	DSPG	LLTC	ATML	ONNN
MU	FSL	LSCC	AUTH	POWI
OIIM	GGOX	MCRL	AVGO	QCOM
OVTI	GSIT	MRVL	CRUS	QUIK
PLXT	HIMX	MXIM	CY	SIMO
PSEM	IKAN	NVDA	DIOD	SLAB
RFMD	MX	PMCS	ENTR	SMI
RMBS	NPTN	QLGC	FCS	SMSC
TQNT	PXLW	SIMG	HITT	SMTC
TSEM	RMTR	SNDK	IDCC	SPRD
VSH	SIGM	TSRA	INFN	SQNS
	SPWR	XLNX	IPHI	STEC
***Short** (s)*	STM		LSI	SUPX
CAVM	VIMC		MCHP	SWKS
CEVA	VTSS		MEMS	TSM
EZCH			MIPS	TXCC
INVN			MOSY	TXN
MLNX			MPWR	UMC *(n)*
			MSCC	VLTR
(x) = change from prior week			MSPD	

—Dan K. Scovel
Semiconductor Analyst

Tokeneke Research LLC
Rowayton, CT 06853
dscovel@tokenekeresearch.com
www.tokenekeresearch.com
203-554-4621

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