Semiconductor Investment Ideas

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

—Dan K. Scovel
Semiconductor Analyst

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