

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

(x) = change from prior week

—Dan K. Scovel
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