Semiconductor Investment Ideas

Long *(l)*	***Long but Distressed*** *(d)*	***Long--But Upside Incremental*** *(ui)*	***Not Compelling Long or Short*** *(nc)*	
IDTI	AMD	ATML	ACTS	NLST
INTC *(ui)*	ANAD	BRCM *(nc)*	ADI	NPTN
MU	AOSL	CY	ADNC	OIIM
OVTI	BCDS	EXAR	ALTR	PLXT
RFMD	CODE	GIG	AMCC	PMCS
TQNT	FSL	GSIT	AVGO	POWI
VSH	HIMX	ISIL	CEVA	PSMI
	IKAN	ISSI	CRUS	QCOM
	INFN	IXYS	DIOD	QUIK
Short *(s)*	MEMS	LSCC	DSPG	RDA
CAVM	MX	LSI	ENTR	RMTR
EZCH	NXPI	MRVL	FCS	SIGM
IDCC	PXLW	NVDA	HITT	SLAB
INVN	RMBS	ONNN	IPHI	SMI
MLNX	SPRD	PSEM *(nc)*	IRF	SMTC
	SPWR	QLGC	LLTC	SQNS
	STM	SIMG	MCHP	STEC
	TSEM	SIMO	MCRL	SUPX
	VIMC	SNDK	MIPS	SWKS
	VTSS	TSRA	MOSY	TSM
			MPWR	TXCC
			MSCC	TXN
			MSPD	UMC
			MTSI	VLTR
			MXIM	XLNX
(x) = change from 11/3/12			MXL	

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Semiconductor Analyst

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