Semiconductor Investment Ideas

***Long** (l)*	***Long but Distressed** (d)*	***Long--But Upside Incremental** (ui)*	***Not Compelling Long or Short** (nc)*	
HIMX	AMD	CY	ACTS	MRVL
MU	ANAD	EXAR	ADI	MSCC
OVTI	AOSL	IXYS	ADNC *(d)*	MTSI
SIMG	CODE	PSEM	ALTR	MXIM
	DSPG	QLGC	AMBA	MXL
	FSL	SMTC	AMCC	NVDA
	GIG	VSH	ATML	NXPI
	IKAN		AVGO	ONNN
	MX		BRCM	PLXT
	NLST		CEVA	PMCS
	NPTN		CRUS	POWI
***Short** (s)*	OIIM		DIOD	QCOM
CAVM	PSMI		ENTR *(d)*	QUIK
EZCH	PXLW		FCS	RFMD
IDCC	SIGM		GSIT	RMBS
INVN	SQNS		IDTI	SIMO
MPWR	STM		INFN	SLAB
	TSEM		INTC	SMI
	VIMC		IPHI	SNDK
			IRF	SPWR
			ISIL	SWKS
			ISSI	TQNT
			LLTC	TSM
			LSCC	TSRA
			MCHP	TXN
(x) = change from 7/21/14			MCRL	UMC
			MLNX	VTSS
			MONT	XLNX
			MOSY	

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