

**Semiconductor Investment Ideas**

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

*( x ) = change from 9/14/14*

**—Dan K. Scovel**  
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