

# Bill Gunderson's Weekly "Best Stocks Now" Newsletter

*Straightforward, honest research and advice for successful people...*

<http://www.pwstreet.com>

@BillGunderson on Twitter

[Bill@pwstreet.com](mailto:Bill@pwstreet.com) *Let me hear from you!*

August 24, 2012



*Bill Gunderson-President and Founder of Gunderson Capital Mgt. Inc.*

## ***To Ease or Not to Ease...***

Quantitative easing (money printing) is almost like a drug. It is a temporary band-aid designed to mask the underlying structural problem. It is also very addictive and should only be applied in extreme circumstances. Fed Chairman, Ben Bernanke will meet with his European counterpart, Mario Draghi this week in Jackson Hole, Wyoming. The U.S. markets reversed upwards on Friday after more easing talk was bantered about.

Now that Mitt Romney has spoken out against Mr. Bernanke, it would not surprise me to see *Helicopter Ben* grease the printing press in order to help tip the upcoming election. It seems to me that most European leaders would rather see President Obama re-elected, and it is almost certain that they will step up the buyback of their own bonds.

My theory is also backed up by the move that gold and silver are making. In addition to this, we are seeing a sell-off in the U.S. Dollar and a rally in the oil pits. Gasoline (UGA) hit an all-time for this time of year this past week. Let's begin our walk through the market this week, by checking out a chart of gasoline:



This is not good for the economy...

Now let's look at the dollar...



The dollar does not like quantitative easing...

Gold does...



So does Silver...



I am adding Silver Wheaton to my Conservative Portfolio this week:



This is the first foray that I have made into the precious metals in over a year.

Europe (EFA) continues on a run that has taken it for a 20% ride over the last three months.



Here in the U.S. meanwhile, the S&P 500 broke out earlier this week:



The NASDAQ also had a little breakout earlier in the week, only to pullback a bit.



When all was said and done, here is how the week ended:

	<b>Fri. 8/17/12</b>	<b>Fri. 8/24/12</b>	<b>Week</b>	<b>Week Pct.</b>
	<b>Close</b>	<b>Close</b>	<b>Change</b>	<b>Change</b>
<b>S&amp;P500</b>	1418.16	1411.13	<b>-7.03</b>	<b>-0.50%</b>
<b>DJIA</b>	13,275.20	13,175.74	<b>-99.46</b>	<b>-0.75%</b>
<b>NASD</b>	3076.59	3069.79	<b>-6.80</b>	<b>-0.22%</b>
<b>S&amp;P600 (Small)</b>	461.19	455.93	<b>-5.26</b>	<b>-1.14%</b>
<b>Emg. Mkts (ADRE)</b>	39.03	38.29	<b>-0.74</b>	<b>-1.90%</b>
<b>Spain (EWP)</b>	26.03	25.63	<b>-0.40</b>	<b>-1.54%</b>
<b>Italy (EWI)</b>	11.61	11.53	<b>-0.08</b>	<b>-0.69%</b>
<b>Greece (GREK)</b>	12.13	12.36	<b>0.23</b>	<b>1.90%</b>
<b>U.S. 10yr. Tr.</b>	1.82%	1.68%	<b>-0.14%</b>	<b>7.69%</b>
<b>Greece 10yr. Bond</b>	24.34%	24.38%	<b>0.04%</b>	<b>-0.16%</b>
<b>Italy 10yr. Bond</b>	5.89%	5.79%	<b>-0.10%</b>	<b>1.70%</b>
<b>Spain 10yr. Bond</b>	6.84%	6.44%	<b>-0.40%</b>	<b>5.85%</b>
<b>Oil</b>	96.21	96.12	<b>-0.09</b>	<b>-0.09%</b>
<b>Gold</b>	1617.50	1673.40	<b>55.90</b>	<b>3.46%</b>

The big winners for the week were bonds and gold on hopes of more stimulus. The equities markets finished slightly down for the week.

Here is where we stand year-to-date:

	<b>12/31/11</b>	<b>Fri. 8/24/12</b>	<b>2012</b>	<b>YTD Pct.</b>
	<b>Value</b>	<b>Close</b>	<b>YTD</b>	<b>Change</b>
<b>S&amp;P500</b>	<b>1257.60</b>	<b>1411.13</b>	<b>153.53</b>	<b>12.21%</b>
<b>DJIA</b>	<b>12,239.74</b>	<b>13,175.74</b>	<b>936.00</b>	<b>7.65%</b>
<b>NASD</b>	<b>2610.68</b>	<b>3069.79</b>	<b>459.11</b>	<b>17.59%</b>
<b>S&amp;P600 (Small)</b>	<b>415.07</b>	<b>455.93</b>	<b>40.86</b>	<b>9.84%</b>
<b>Emg. Mkts (ADRE)</b>	<b>39.89</b>	<b>38.29</b>	<b>-1.60</b>	<b>-4.01%</b>
<b>Spain (EWP)</b>	<b>30.37</b>	<b>24.91</b>	<b>-5.46</b>	<b>-17.98%</b>
<b>U.S. 10yr. Tr.</b>	<b>1.87%</b>	<b>1.68%</b>	<b>-0.19%</b>	<b>10.16%</b>
<b>Spain 10yr. Bond</b>	<b>5.22%</b>	<b>6.44%</b>	<b>1.22%</b>	<b>-23.37%</b>
<b>Oil</b>	<b>98.87</b>	<b>96.12</b>	<b>-2.75</b>	<b>-2.78%</b>
<b>Gold</b>	<b>1565.90</b>	<b>1673.40</b>	<b>107.50</b>	<b>6.87%</b>

Those are some pretty healthy gains for our markets this year! I am glad, at least for now, that I did not listen to all of the doomsayers.



But, they sure sell a lot of newsletters and get their face all over TV. They may eventually be right, but have they made you any money lately?

The gradual uptrend in the market continues...

The NASDAQ has resumed leadership once again for now...

With all of this talk of easing in Wyoming this week, it still makes sense to be fully invested for now. But, I highly recommend being invested in the **BEST STOCKS NOW**.



@billgunderson

Please follow me on Twitter, Facebook, or LinkedIn throughout the week for any changes in my current stance on the market or individual stocks. My tweets are also found on my **BEST STOCKS NOW** app every day, and on the [homepage](#) of my website: <http://www.pwstreet.com>





twitter



My new show on the Salem Broadcast Network is now heard live every weekday from 7:00am to 8:00am PST.

You can listen live to the show on the internet through the station's websites:



<http://www.kkol.com/> Seattle



My Twin Cities shows airs at 7am and 9am CST.

<http://www.business1570.com/> St.Paul/Minneapolis



ORLANDO, FLORIDA



SAN DIEGO, INLAND EMPIRE, AND ORANGE COUNTY.



You can also LISTEN on the Tune-in App or the Best Stocks Now app.



In addition to this we will also download the shows to the radio archives on my website <http://pwstreet.com> and send them to iTunes. You can also listen on the BEST STOCKS NOW App. There is no excuse to not keep up on your investments!



*"Quit making so much noise! He is talking about something called iPhone!"*

### **Bill Gunderson's Model Portfolio for Conservative Growth Investors:**

This model is made up of mostly mid-cap and large cap companies that I consider to be suitable for investors who have a conservative growth risk profile. Time horizon of at least 3-5 years would be appropriate.

This portfolio is up **14.0%** year-to-date, while the S & P 500 is up **12.2% (as of the close on Friday)** and the Dow is up **8.3%**. The portfolio currently has an **8.9%** cash. I sold

THIS SECTION FOR SUBSCRIBERS AND CLIENTS ONLY

### **Bill Gunderson's Model Portfolio for Investors seeking *AGGRESSIVE* Growth**



### ***Are you Aggressive?***

This is my most aggressive portfolio. It is designed for investors with long-term time horizons, seeking maximum growth. This portfolio is made up mainly of small and mid-cap stocks with superior growth potential.

This portfolio is much more volatile than the *Conservative Growth Portfolio* and the *Income Portfolio*. This portfolio also carries more risk than the other two. It also has a higher turnover rate. It also has the most upside potential, however.

This portfolio is up **11.1%** YTD, while the S & P 500 is up **12.0%** and the S&P 600 small-cap index is up **10.0% (as of 8:30 am on Friday)**. Cash level is now **2.2%**.

I am selling

THIS SECTION FOR CLIENTS AND SUBSCRIBERS ONLY

**Gunderson's Model Portfolio for investors seeking Income along with the possibility of Growth. This is a good mix for retirees.**



***"I am sure glad I have Gunderson watching my portfolio for me."***

This model is my most conservative model. It is designed for risk-adverse investors that want *income* first and *growth* second. Income producing investments have proven themselves over time to be much less volatile than pure growth investments.

If you look back at the year 2008, when the overall market was down 38.5%, income producers held up much better. They also *underperform* during a *go-go market*, however. **It is also important to remember, that even very conservative, income producing stocks still fluctuate with the markets!**

This portfolio is designed as ***a bond or CD alternative***, albeit with more risk. This portfolio currently has an average yield of 5.6%. Compare this with the current U.S. Treasury yield of 1.8% and current CD yields.

This portfolio is up **16.03** since its August 5, 2011 inception, not bad for an income account. That works out to a cool 16.5% annual rate. I am

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**Bill Gunderson is a professional fee-based money manager. Gunderson Capital Management manages hundreds of accounts all across the country. Minimum account size is \$50,000. Annual Mgt. fees are 2% on accounts under \$250,000, 1.5%-1.75% on accounts between \$250k and \$1 million, and 1% on accounts over \$1 million. Call us for a portfolio evaluation and more information. (855)611-BEST.**

Bill Gunderson is also columnist for *The Street.com*, *MarketWatch.com*, and *SeekingAlpha.com* Here is a copy of this week's article.

The Street logo, featuring the words "The Street" in a bold, black, sans-serif font, with three horizontal lines underneath.MarketWatch logo, with "Market" in black and "Watch" in green, featuring a green upward-pointing arrow above the "W". Below it, "From DOWJONES" is written in a smaller, black, sans-serif font.Seeking Alpha logo, with "Seeking Alpha" in white, sans-serif font, and a small orange Greek letter alpha symbol to the right.

This week's articles:

I has two articles published this past week. The first article did a side by side comparison of Lowe's vs. Home Depot. It was on the front page of *Marketwatch* on Tuesday.

<http://www.marketwatch.com/story/lowes-vs-home-depot-2012-08-21>

The second article asked and answered the following question:

Is your 401 (k) ignoring these hot sectors?

<http://www.thestreet.com/story/11672279/1/is-your-401k-ignoring-these-hot-sectors.html>

I track just over 2,800 stocks, funds, eff's, etc. I spend several hours looking at them. I especially focus in on the ones I own, the stocks rising in rank, and the A- or better rated stocks (usually about the top 200).

My proprietary grading system consists of Value, Performance, and Safety. I like stocks that have performed much better than the rest, and still offer good value. I spent years developing this grading system and I am thrilled with the results! When it comes to growth stocks, I pretty much stay within the top 200. I do dip down lower than that when it comes to income stocks, however.

Here is a good example of a stock that meets my criteria this week. This stock is also the newest member in my aggressive growth portfolio.

**BEST STOCKS NOW! APP**

**Silver Wheaton**

Sector	Basic Materials
Market Cap	12,060,000,000
Size	Large-Cap
Risk Profile	Moderate

**Valuation 08/24/12**

Last Closing Price	\$34.08
Next Yr EPS Est	\$2.13
Forward PE Ratio	16.00
Est 5Yr Annual Gr	23.00%

**Valuation 08/24/12**

Last Closing Price	\$34.08
Next Yr EPS Est	\$2.13
Forward PE Ratio	16.00
Est 5Yr Annual Gr	23.00%
PEG Ratio	0.70
5Year Target Price	\$63.23
Dividend Yield	1.20%
5Yr Tot Ret Pot	91.5%

**Gunderson Value Grade**

**A-**

**Performance of slw vs S&P 500**

1 Mo Total Return	34.5%	5.4%
3 Mo Total Return	29.3%	6.9%
12 Mo Total Return	-7.2%	19.8%
Momentum Grade	B	C
3 Yr Avg Tot Ret	50.9%	11.2%
5 Yr Avg Tot Ret	24.5%	-0.9%
10 Yr Avg Tot Ret	N/A	4.1%
Performance Grade	NA	C
2008 Total Return	-61.8%	-38.5%
Safety Grade	D+	C

**Gunderson Stock Grade**

**A-**

**Ranking**

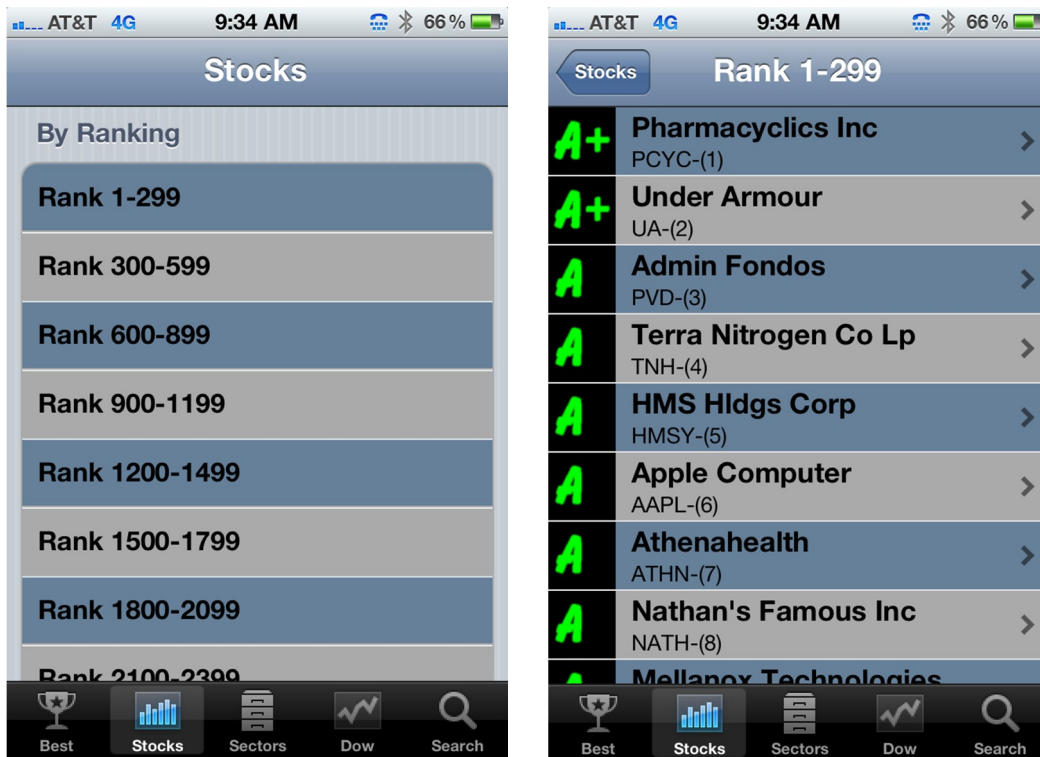
Current	89 / 2888
1 day ago	88
7 days ago	129
1 month ago	727
2 months ago	730
3 months ago	1113



Silver Wheaton Corp., a mining company, together with its subsidiaries, operates as a silver streaming company worldwide. The company has 14 long-term silver purchase agreements and 2 long-term precious metal purchase agreements whereby it acquires silver and gold production from the counterparties located in Mexico, the United States, Greece, Sweden, Perú, Chile, Argentina, and Portugal. Silver Wheaton Corp. is headquartered in Vancouver, Canada.

**Bill Gunderson's Weekly Top 200 List. These are the stocks that currently possess the best combination of performance and value. This is a great shopping list! This list represents the top 7% of the entire market.**

**I am currently beta testing the update to my app which will allow user to look up stocks by rank:**



**TOP 200 LIST IS FOR CLIENTS AND SUBSCRIBERS ONLY**

*Bill Gunderson's*

**Best Stocks Now**

**Top 200 as of 8/17/2012**

			Three	Two	Six	One	Two	One		
			Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Yest.	Current
			Rank	Rank	Rank	Rank	Rank	Rank	Rank	Rank
B+	CRI	Carters Inc	267	42	100	121	219	141	147	151
B+	DX	Dynex Capital	293	151	108	112	180	152	215	152
B+	WXS	Wright Express Corp	911	375	336	376	220	172	163	153
B+	DTV	The DirecTV Group Inc.	739	400	283	274	205	237	148	154
B+	SAFT	Safety Insurance Grp	467	377	351	234	207	211	140	155
B+	JHX	James Hardee Industrial	984	403	129	83	63	161	127	156
B+	PRGO	Perrigo Co	133	40	33	54	81	111	145	157
B+	SHLM	Schulman A Inc	1330	2068	1716	962	421	406	170	158
B+	BFB	Brown Forman Corp Cl B	101	256	154	152	321	165	201	159
B+	GNRC	Generac Holdings Inc	2746	94	1156	25	113	116	142	160
B+	GRA	Grace WR & Co	397	333	465	276	293	252	141	161
B+	TGH	Textainer Group	37	362	95	34	325	200	155	162
B+	WYN	Wyndham Worldwide Corp	99	64	68	162	290	107	247	163
B+	CYNO	Cynosure Inc.	210	360	221	136	159	247	111	164
B+	DISCA	Discovery Holding Co.	223	105	117	273	109	159	139	165
B+	KWR	Quaker Chemical	567	275	278	408	623	323	169	166
B+	VFC	VF Corp	299	109	304	264	49	53	253	167
B+	WSM	Williams-Sonoma Inc	1125	889	559	735	552	278	95	168
B+	SINA	Sina Corp Inc	585	1229	689	1264	904	478	146	169
B+	USNA	USANA Health Sciences Inc	290	222	239	295	96	164	124	170
B+	WFM	Whole Foods Market	117	37	43	88	461	463	159	171
B+	AMT	American Tower Corp	87	48	49	60	111	166	227	172
B+	SHF	Weider Nutrition Intl Inc	116	356	261	239	394	421	174	173
B+	JBHT	Hunt JB Trans Scvcs Inc	175	53	71	186	143	51	151	174
B+	SHOO	Stephen Madden	498	312	950	899	122	137	175	175
B+	DTG	Dollar Thrifty Automotive	330	205	293	263	679	311	275	176
B+	ALGN	Align Tech Inc	46	92	50	140	136	100	334	177
B+	KTCC	Key Tronic Corp	365	538	224	560	789	404	123	178
B+	MWIV	M W I Veterinary Supply	70	85	57	76	337	228	224	179
B+	NOV	National Oilwell Varco Inc	840	667	715	818	163	198	161	181
B+	SBS	Companhia Siderurgica Corp	814	719	795	695	352	390	162	182
B+	IGTE	IGate Corp	237	235	253	652	261	243	185	183
B+	NEOG	Neogen Corp	201	71	42	85	231	256	210	184
B+	RDEN	Elizabeth Arden	759	387	438	562	356	344	180	185
B+	UGA	United States Gasoline Fund LP	1839	1451	1247	698	74	92	186	186
B+	MED	Medifast Inc	614	243	286	541	380	450	135	187
B+	FAST	Fastenal Co	227	348	486	175	72	74	241	188
B+	ULTA	Ulta Salon	345	57	125	382	431	191	267	189
B+	AWF	Alliance World Dollar Government Fund II	514	196	280	195	130	96	243	190
B+	KMM	DWS Multi-Market Income Trust	451	317	162	103	168	169	204	191
B+	PII	Polaris Industries Inc	22	22	131	74	153	105	173	192
B+	VAL	Valspar Corp	475	160	114	108	513	289	194	193
B+	NTCT	Netscout Systems Inc	664	386	394	505	271	261	195	194
B+	CALX	Calix Inc.	551	617	386	1418	1463	358	154	195
B+	RXL	ProShares Ultra Health Care	0	0	447	303	408	507	328	196
B+	PXP	Plains Explor & Prod	1333	1225	1018	814	323	340	675	197
B+	TRS	Trimas Corp.	1556	655	727	933	90	160	182	198
B+	TTC	Toro Co	332	143	105	144	149	119	178	199
B+	ABAX	Abaxis Inc	264	161	158	131	528	569	143	200



Bill Gunderson's Top 200 is a new feature in the newsletter. I can tell you from experience that it is very powerful. The Top 200 is a reflection of the market and the economy. These trends can remain in place for a long time. Sometimes bonds are at the top, sometimes cash is at the top, and there are even times when inverse funds rule the roost. Study this list carefully each week.

## 401-K Section

Everyone has different choices to them in their 401-ks. The choices basically fall into about broad categories however:

Large Cap, Mid-Cap, Small-Cap, Govt. Bond, Corp. Bond, Inflation Protected Bond, International, Emerging Market, and maybes sectors like technology, natural resources, etc.

I have added a number mutual funds to my **Best Stocks Now** database that are representative of the various categories of funds that are available in most 401k plans. I grade them on a daily basis. I only want to own funds that are ranked 850 or higher, overall.

Of the funds that I am tracking, Here is my current basic recommendation.

**GUNDERSON**

Best Stocks Now

**401-K Allocation 8/24/12**

		<b>Rank</b>	<b>Suggested Allocation</b>
A-	BIPIX Profunds Biotech Ultra	<b>81</b>	
A-	UOPIX Profunds Ultra NASDAQ	<b>117</b>	
B+	PRHSX T.Rowe Price Health Science	<b>214</b>	<b>10.0%</b>
B+	FBDIX Franklin Biotechnology Discovery	<b>218</b>	
B+	FBTIX Fidelity Advisor Biotechnology	<b>219</b>	
B+	FBIOX Fidelity Select Biotechnology	<b>220</b>	<b>10.0%</b>
B+	RYOIX Rydex Biotech Fund I	<b>239</b>	
B+	FBMPX Fidelity Sel. Multimedia	<b>318</b>	<b>10.0%</b>
B	BTTRX Amer. Cent. Zeros 2025	<b>594</b>	
B	PETDX PIMCO Real Est. Real Ret. Strat.	<b>596</b>	
B	FDFAX Fidelity Select Consumer Staples	<b>616</b>	<b>10.0%</b>
B	FADTX Fidelity Advisor Technology A	<b>657</b>	
B	FATIX Fidelity Advisor Technology I	<b>658</b>	<b>10.0%</b>
B	FSAGX Fidelity Select Gold	<b>682</b>	<b>10.0%</b>
B	FMKAX Fidelity Advisor Emerging Markets Inc A	<b>700</b>	<b>10.0%</b>
B	DGVRX Dreyfus Technology Gr. 1	<b>722</b>	
B	FSCRX Fidelity Small Cap Discovery	<b>726</b>	<b>10.0%</b>
B	FSHOX Fidelity Select Construction & Housing	<b>745</b>	<b>10.0%</b>
B	PREPX Principal Real Estate Sec R5	<b>768</b>	
B	BTTTX Amer. Cent. Zeros 2020	<b>769</b>	
B	BUFOX Buffalo Micro Cap	<b>771</b>	
B	FCLAX Fidelity Advisor Industrials A	<b>809</b>	
B	NBRFX Neuberger Berman Real Est. Tr.	<b>851</b>	<b>10.0%</b>
B	CREEX Columbia Real Est. Z	<b>855</b>	
			<b>100.0%</b>

Notice that there are no Large Cap, Mid Cap, but Small Cap has now entered the picture. I noted last week that small-caps are rising. Several other sectors are coming back into favor as the market goes more on offense. Do the best you can with the choices that you have!

# INTERNATIONAL AND EMERGING MARKET WATCH:

## As of August 24, 2012

		<u>2012 ytd</u>
Vietnam	VNM	24.9%
Thailand	THD	18.2%
Mexico	EWX	17.3%
India	INP	11.2%
United States	^GSPC	12.8%
Peru	EPU	5.9%
Europe	EFA	5.6%
Russia	RSX	4.7%
Emerging Mkts.	ADRE	2.5%
Canada	EWC	4.2%
Chile	CH	2.3%
Japan	EWJ	2.5%
China	FXI	-1.1%
Brazil	EWZ	-3.5%
Italy	EWI	-3.2%
Greece	GREK	-13.5%
Spain	EWP	-14.0%

# COMMODITIES (as of August 24, 2012)

		<u>2012 YTD</u>
Grains	JJG	40.9%
Corn	CORN	22.0%
Gasoline	UGA	21.3%
Silver	SLV	10.4%
Gold	GLD	6.5%
Copper	JJC	0.2%
Oil	USO	-6.4%
Steel	SLX	-8.2%
Livestock	COW	-8.3%
Cotton	BAL	-11.9%
Coal	KOL	-26.5%

Watch for Bill Gunderson on:



The San Diego



Here are snippets on all of the stocks I have talked about on my radio show, and articles that I have written over the last few months. They are in alphabetical order.

<http://pwstreet.com/good-bad-stocks/>

## 2012 Conservative Growth Model Portfolio Sells

	<u>Bought</u>	<u>Bought</u>	<u>Bought</u>	<u>Sector</u>	<u>Buy Price</u>	<u>Shares</u>	<u>Tot. Buy</u>	<u>Sell Price</u>	<u>Total Sell</u>	<u>Pct. G/L</u>	<u>Sell Date</u>
1	27-May-11	VIV	Telefonica Brasil	Utility	\$27.96	158	\$4,418	\$27.79	\$4,391	-0.6%	3-Feb-12
2	19-Nov-10	ARLP	Alliance Res. Ptrs.	Commoditie	\$57.92	93	\$5,387	\$72.44	\$6,737	25.1%	2-Mar-12
3	10-Jun-11	KOF	Coca Cola Femsa	Consumer	\$88.13	52	\$4,583	\$101.16	\$5,260	14.8%	9-Mar-12
4	21-Oct-11	MCD	McDonalds	Consumer	\$91.63	49	\$4,490	\$95.60	\$4,684	4.3%	23-Mar-12
5	6-Nov-08	KMP	Kinder Morgan	Energy	\$43.10	55	\$2,371	\$82.32	\$4,528	91.0%	30-Mar-12
6	13-Jan-12	EOG	E O G Resources	Energy	\$103.04	46	\$4,740	\$109.18	\$5,022	6.0%	6-Apr-12
7	6-Nov-08	O	Realty Income	REIT	\$16.68	130	\$2,168	\$37.50	\$4,875	124.8%	6-Apr-12
8	6-Jan-12	AAPL	Apple Computer	Technology	\$422.40	2	\$845	\$608.90	\$1,218	44.2%	13-Apr-12
9	7-Jan-11	PCLN	Priceline.com	Consumer	\$440.59	6	\$2,644	\$742.13	\$4,453	68.4%	13-Apr-12
10	4-Feb-12	CAT	Caterpillar	Industrial	\$113.94	41	\$4,672	\$106.62	\$4,371	-6.4%	13-Apr-12
11	2-Mar-12	CMI	Cummins Engine	Industrial	\$120.38	35	\$4,213	\$114.94	\$4,023	-4.5%	13-Apr-12
12	13-Jan-12	CELG	Celgene	Medical	\$72.63	64	\$4,648	\$73.45	\$4,701	1.1%	27-Apr-12
13	30-Mar-12	BIDU	Baidu	Technology	\$145.77	33	\$4,810	\$134.60	\$4,442	-7.7%	27-Apr-12
14	12-Aug-11	TNH	Terra Nitrogen	Commoditie	\$165.98	27	\$4,481	\$237.40	\$6,410	43.0%	4-May-12
15	22-Apr-11	ABV	Comp de Bebida	Consumer	\$31.07	144	\$4,474	\$39.67	\$5,712	27.7%	11-May-12
16	29-Jul-11	UGP	Ultrapar Participaco	Utility	\$17.83	252	\$4,493	\$21.71	\$5,471	21.8%	11-May-12
17	21-Oct-11	GWW	Grainger	Industrial	\$167.03	27	\$4,510	\$186.29	\$5,030	11.5%	18-May-12
18	27-Apr-12	EC	Ecopetrol	Energy	\$63.13	62	\$3,914	\$57.42	\$3,560	-9.0%	25-May-12
19	22-Apr-11	FMX	Fomento Econ Mex	Consumer	\$62.48	72	\$4,499	\$78.41	\$5,646	25.5%	25-May-12
20	9-Mar-12	BPT	B P Prudhoe Bay	Energy	\$124.11	38	\$4,716	\$107.20	\$4,074	-13.6%	1-Jun-12
21	27-Apr-12	DISCA	Discovery Com Cl A	Media	\$54.93	70	\$3,845	\$51.01	\$3,571	-7.1%	8-Jun-12
22	20-Apr-12	YUM	Yum! Brands	Consumer	\$73.72	63	\$4,644	\$64.03	\$4,034	-13.1%	8-Jun-12
23	25-May-12	EFZ	Europe Inverse 1X	Inverse	\$52.06	91	\$4,737	\$50.28	\$4,575	-3.4%	22-Jun-12
24	18-May-12	EUM	Emg. Mkts. Inverse 1:1	Hedge	\$33.32	142	\$4,731	\$32.23	\$4,577	-3.3%	22-Jun-12
25	22-Oct-10	AZO	Aut ozone	Consumer	\$234.72	14	\$3,286	\$359.00	\$5,026	52.9%	27-Jun-12
26	6-Apr-12	ESRX	Express Scripts	Medical	\$56.94	70	\$3,986	\$51.90	\$3,633	-8.9%	25-Jun-12
27	20-Apr-12	ORLY	O'Reilly Automotive	Consumer	\$96.63	48	\$4,638	\$95.23	\$4,571	-1.4%	25-Jun-12
28	7-Jan-11	PCLN	Priceline.com	Consumer	\$440.59	7	\$3,084	\$643.46	\$4,504	46.0%	28-Jun-12
29	8-Jun-12	FXP	China Inverse 2:1	Inverse	\$31.06	150	\$4,659	\$27.86	\$4,179	-10.3%	20-Jul-12
30	8-Jun-12	WFM	Whole Foods Mkt.	Consumer	\$90.67	52	\$4,715	\$85.23	\$4,432	-6.0%	20-Jul-12
31	20-Apr-12	ISRG	Intuitive Surgical	Medical	\$575.60	8	\$4,605	\$498.50	\$3,988	-13.4%	20-Jul-12
32	26-Aug-11	MA	Mastercard	Consumer	\$325.17	14	\$4,552	\$409.89	\$5,738	26.1%	24-Jul-12
33	21-Oct-11	SBUX	Starbucks	Consumer	\$41.93	108	\$4,528	\$50.41	\$5,444	20.2%	25-Jul-12
34	6-Apr-12	FDO	Family Dollar	Consumer	\$64.84	62	\$4,020	\$62.35	\$3,866	-3.8%	24-Aug-12
										<u>16.4%</u>	

## Gunderson Aggressive Growth Model Portfolio Sells 2012

	<u>Symbol</u>	<u>Name</u>	<u>Sector</u>	<u>Bought</u>	<u>Buy Price</u>	<u>Shares</u>	<u>Tot. Buy</u>	<u>Sell Price</u>	<u>Total Sell</u>	<u>Pct. G/L</u>	<u>Sell Date</u>
1	BJRI	B J Restaurants	Consumer	22-Apr-11	\$46.56	98	\$4,563	<b>\$45.99</b>	\$4,507	-1.2%	6-Jan-12
2	EGOV	NI C Inc.	Technology	28-Oct-11	\$14.23	317	\$4,511	<b>\$11.92</b>	\$3,779	-16.2%	3-Feb-12
3	WRLD	World Acceptance	Financial	30-Dec-11	\$73.50	59	\$4,337	<b>\$65.48</b>	\$3,863	-10.9%	10-Feb-12
4	RDEN	Elizabeth Arden	Consumer	28-Oct-11	\$35.13	128	\$4,497	<b>\$39.23</b>	\$5,021	11.7%	17-Feb-12
5	DG	Dollar General	Consumer	30-Sep-11	\$37.76	118	\$4,456	<b>\$42.23</b>	\$4,983	11.8%	17-Feb-12
6	HEK	Heckman Corp.	Energy	18-Dec-11	\$6.74	648	\$4,368	<b>\$5.19</b>	\$3,363	-23.0%	2-Mar-12
7	SMP	Standard Motor Prod.	Automotive	23-Dec-11	\$20.73	211	\$4,374	<b>\$20.65</b>	\$4,357	-0.4%	9-Mar-12
8	LKQX	L K Q Corp.	Consumer	7-Oct-11	\$26.79	169	\$4,528	<b>\$31.68</b>	\$5,354	18.3%	9-Mar-12
9	MNRO	Monroe Muffler	Consumer	10-Feb-12	\$44.24	90	\$3,982	<b>\$41.85</b>	\$3,767	-5.4%	23-Mar-12
10	QSII	Quality Systems	Medical	26-Aug-11	\$44.22	97	\$4,289	<b>\$42.38</b>	\$4,111	-4.2%	23-Mar-12
11	NUS	Nu Skin Enterprises	Consumer	40767	39.58	60	2374.8	<b>58.57</b>	3514.2	48.0%	6-Apr-12
12	CLH	Clean Harbors	Energy	8-Apr-11	\$51.78	84	\$4,350	<b>\$66.33</b>	\$5,572	28.1%	6-Apr-12
13	NUS	Nu Skin Enterprises	Consumer	12-Aug-11	\$39.58	60	\$2,375	<b>\$56.79</b>	\$3,407	43.5%	6-Apr-12
14	DPZ	Domino's Pizza	Consumer	16-Sep-11	\$28.28	170	\$4,808	<b>\$35.14</b>	\$5,974	24.3%	13-Apr-12
15	GEOI	Georesources	Energy	3-Feb-12	\$32.13	142	\$4,562	<b>\$30.74</b>	\$4,365	-4.3%	13-Apr-12
16	PETM	PetSmart	Consumer	21-Oct-11	\$47.41	95	\$4,504	<b>\$56.55</b>	\$5,372	19.3%	13-Apr-12
17	AAPL	Apple Comp.	Technology	5-Mar-10	\$218.95	3	\$657	<b>\$614.41</b>	\$1,843	180.6%	13-Apr-12
18	ALXN	Alexion Pharm.	Medical	26-Aug-11	\$54.68	27	\$1,476	<b>\$89.70</b>	\$2,422	64.0%	13-Apr-12
19	PCLN	Priceline.com	Leisure	29-Oct-11	\$376.23	4	\$1,505	<b>\$736.19</b>	\$2,945	95.7%	13-Apr-12
20	FCFS	First Cash Financial	Financial	1-Apr-11	\$38.61	110	\$4,247	<b>\$38.99</b>	\$4,289	1.0%	20-Apr-12
21	TPX	Tempur Pedic	Consumer	6-Apr-12	\$85.80	50	\$4,290	<b>\$59.59</b>	\$2,980	-30.5%	27-Apr-12
22	PIR	Pier One Imports	Consumer	6-Jan-12	\$15.00	286	\$4,290	<b>\$17.87</b>	\$5,111	19.1%	4-May-12
23	VLTR	Voltterra Semiconductor	Technology	17-Feb-12	\$31.88	128	\$4,081	<b>\$30.51</b>	\$3,905	-4.3%	4-May-12
24	TYL	Tyler Technologies	Technology	14-Oct-11	\$28.33	160	\$4,533	<b>\$37.38</b>	\$5,981	31.9%	11-May-12
25	PEET	Peet's Coffee	Consumer	20-May-11	\$48.55	83	\$4,030	<b>\$64.00</b>	\$5,312	31.8%	11-May-12
26	ACFN	Acorn Energy	Energy	30-Mar-12	\$10.87	355	\$3,859	<b>\$9.10</b>	\$3,231	-16.3%	18-May-12
27	RGR	Sturm Ruger	Leisure	11-May-12	\$50.21	98	\$4,921	<b>\$42.49</b>	\$4,164	-15.4%	18-May-12
28	BWLD	Buffalo Wild Wings	Consumer	2-Mar-12	\$87.07	38	\$3,309	<b>\$82.31</b>	\$3,128	-5.5%	18-May-12
29	STX	Seagate Technology	Technology	17-Feb-12	\$26.87	152	\$4,084	<b>\$25.99</b>	\$3,950	-3.3%	25-May-12
30	PCLN	Priceline.com	Leisure	29-Oct-11	\$376.23	7	\$2,634	<b>\$656.00</b>	\$4,592	74.4%	25-May-12
31	CLB	Core Labs	Energy	27-Apr-12	\$136.02	37	\$5,033	<b>\$122.86</b>	\$4,546	-9.7%	1-Jun-12
32	PII	Polaris Industries	Consumer	28-Oct-11	\$62.71	72	\$4,515	<b>\$69.96</b>	\$5,037	11.7%	15-Jun-12
33	TSCO	Tractor Supply	Consumer	11-May-12	\$98.94	50	\$4,947	<b>\$87.77</b>	\$4,389	-11.3%	15-Jun-12
34	AZO	Autozone	Consumer	8-Oct-10	\$232.81	9	\$2,095	<b>\$382.76</b>	\$3,445	64.4%	22-Jun-12
35	EFZ	Europe Inverse 1:1	Inverse	25-May-12	\$51.98	92	\$4,782	<b>\$50.28</b>	\$4,626	-3.3%	22-Jun-12
36	EUM	Emg. Mkts Inverse 1:1	Inverse	18-May-12	\$33.32	138	\$4,598	<b>\$31.81</b>	\$4,390	-4.5%	22-Jun-12
37	GNC	General Nutrition	Consumer	11-May-12	\$40.67	121	\$4,921	<b>\$37.08</b>	\$4,487	-8.8%	22-Jun-12
38	LQDT	Liquidity Services	Consumer	20-Apr-12	\$52.20	95	\$4,959	<b>\$50.18</b>	\$4,767	-3.9%	22-Jun-12
39	MNST	Monster Beverage	Consumer	11-May-12	\$71.28	69	\$4,918	<b>\$71.57</b>	\$4,938	0.4%	29-Jun-12
40	NTES	Netease.com	Leisure	23-Mar-12	\$59.59	73	\$4,350	<b>\$59.19</b>	\$4,321	-0.7%	29-Jun-12
41	REGN	Regeneron Pharm.	Drug	20-Apr-12	\$127.10	39	\$4,957	<b>\$113.92</b>	\$4,443	-10.4%	29-Jun-12
42	SBH	Sally Beauty Hldg.	Consumer	21-Oct-11	\$18.80	239	\$4,493	<b>\$25.42</b>	\$6,075	35.2%	29-Jun-12
43	CRUS	Cirrus Logic	Technology	22-Jun-12	\$29.47	166	\$4,892	<b>\$26.40</b>	\$4,382	-10.4%	6-Jul-12
44	OSIS	O S I Systems	Technology	9-Mar-12	\$60.97	79	\$4,817	<b>\$62.06</b>	\$4,903	1.8%	6-Jul-12
45	ALLT	Allot Communications	Technology	20-Apr-12	\$23.57	210	\$4,950	<b>\$22.37</b>	\$4,698	-5.1%	6-Jul-12
46	PCYC	Pharmacyclics	Drug	25-May-12	\$32.85	145	\$4,763	<b>\$53.05</b>	\$7,692	61.5%	6-Jul-12
47	QCOR	Questcor Pharm.	Drug	27-Apr-12	\$44.70	110	\$4,917	<b>\$50.23</b>	\$5,525	12.4%	6-Jul-12
48	VVUS	Vivus Inc.	Drug	18-May-12	\$22.40	205	\$4,592	<b>\$24.15</b>	\$4,951	7.8%	20-Jul-12
49	FXP	Inverse China 2:1	Inverse	22-Jun-12	\$29.88	163	\$4,870	<b>\$27.99</b>	\$4,562	-6.3%	20-Jul-12
50	AAPL	Apple Comp.	Technology	5-Mar-10	\$218.95	8	\$1,752	<b>\$576.26</b>	\$4,610	163.2%	27-Jul-12
51	NEOG	Neogen	Drug	29-Jun-12	\$47.02	106	\$4,984	<b>\$43.11</b>	\$4,570	-8.3%	27-Jul-12
52	SLXP	Salix Pharmaceuticals	Medical	23-Mar-12	\$52.60	78	\$4,103	<b>\$44.88</b>	\$3,501	-14.7%	31-Jul-12
53	AKRX	Akorn Inc.	Drug	1-Jun-12	\$13.36	348	\$4,649	<b>\$12.68</b>	\$4,413	-5.1%	10-Aug-12
54	BMRN	Biomarin Pharm.	Drug	13-Jul-12	\$43.30	111	\$4,806	<b>\$37.53</b>	\$4,166	-13.3%	10-Aug-12
55	INCY	Incyte Corp.	Drug	13-Jul-12	\$25.47	190	\$4,839	<b>\$18.14</b>	\$3,447	-28.8%	10-Aug-12
56	CERN	Cerner	Medical	22-Jun-12	\$80.80	60	\$4,848	\$71.33	\$4,280	-11.7%	10-Aug-12
57	FDO	Family Dollar	Consumer	6-Apr-12	\$64.84	70	\$4,539	\$64.66	\$4,526	-0.3%	10-Aug-12
58	HIBB	Hibbett Sporting Goods	Consumer	11-May-12	\$60.28	82	\$4,943	\$59.47	\$4,877	-1.3%	10-Aug-12
59	AGNC	American Cap. Agency	Financial	13-Jul-12	\$34.67	139	\$4,819	<b>\$34.08</b>	\$4,737	-1.7%	24-Aug-12

## 2012 Income Model Portfolio Sells

	<u>Bought</u>	<u>Bought</u>	<u>Bought</u>	<u>Sector</u>	<u>Buy Price</u>	<u>Shares</u>	<u>Tot. Buy</u>	<u>Sell Price</u>	<u>Total Sell</u>	<u>Pct. G/L</u>	<u>Sell Date</u>	
1	5-Aug-11	CEF	Central Fund Canada	Pr. Metals	\$23.93	209	\$5,001	\$19.97	\$4,174	-16.5%	6-Jan-12	
2	5-Aug-11	ARLP	Alliance Res. Ptr.	Energy	\$69.34	72	\$4,992	\$61.09	\$4,398	-11.9%	30-Mar-12	
3	5-Aug-11	TSU	T I M Participaco	Telcom	\$26.78	186	\$4,981	\$28.21	\$5,247	5.3%	3-Feb-12	
4	5-Aug-11	NLY	Annaly Mortgage	REIT	\$17.53	285	\$4,996	\$16.17	\$4,608	-7.8%	9-Mar-12	
5	30-Sep-11	NUV	Nuveen Muni Val. Fund	Muni Bond	\$9.73	407	\$3,960	\$9.79	\$3,985	0.6%	23-Mar-12	
6	11-Nov-11	BCE	B C E Inc.	Telcom	\$39.32	104	\$4,089	\$39.81	\$4,140	1.2%	13-Apr-12	
7	5-Aug-11	TNH	Terra Nitrogen	Commodity	\$160.50	31	\$4,976	\$238.65	\$7,398	48.7%	4-May-12	
8	5-Aug-11	VIV	Telefonica Brasil	Telcom	\$29.78	168	\$5,003	\$27.64	\$4,644	-7.2%	11-May-12	
9	5-Aug-11	TU	Telus Corp.	Telcom	\$50.60	99	\$5,009	\$57.96	\$5,738	14.5%	11-May-12	
10	11-Nov-11	AMLPL	Alerian MLP	Energy	\$15.79	258	\$4,074	\$15.46	\$3,989	-2.1%	1-Jun-12	
11	6-Jan-12	BPT	B P Prudhoe Bay	Energy	\$117.12	36.0	\$4,216	\$107.38	\$3,866	-8.3%	1-Jun-12	
12	7-Oct-11	SXL	Sunoco Logistics Ptrs.	Energy	\$29.92	132	\$3,949	\$33.28	\$4,393	11.2%	1-Jun-12	
13	3-Feb-12	SDRL	Seadrill ltd	Energy	\$37.88	117.0	\$4,432	\$32.20	\$3,767	-15.0%	1-Jun-12	
14	4-May-12	NGLS	Targa Resources	Energy	\$45.35	85.0	\$3,855	\$36.65	\$3,115	-19.2%	8-Jun-12	
15	1-Jun-12	EFZ	Europe Inverse 1X	Inverse	\$53.74	\$50.44	79.0	\$4,245	\$50.48	\$3,988	-6.1%	22-Jun-12
16	1-Jun-12	EUM	Emg.Markets Inverse 1X	Inverse	\$33.73	\$31.74	126.0	\$4,250	\$32.29	\$4,069	-4.3%	22-Jun-12
17	6-Jan-12	WHX	Whiting Usa Trust	Energy	\$17.83	\$16.41	240.0	\$4,279	\$9.35	\$2,244	-43.0%	20-Jul-12

MORTGAGE RATES remain at all-time lows. "Craig Brock, our local mortgage expert and bond market commentator on Positively Wall Street is actually closing HARP-2 loans for people (while many banks are hopelessly backlogged). Are you under water on your property? These new rules are helping folks who may not have otherwise qualified for a new loan at these historic low rates!

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