

Bill Gunderson's Weekly "Best Stocks Now" Newsletter

Straightforward, honest research for successful people...

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July 6, 2012



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

Another Miserable Job's Report...

It is hard to believe that a great nation of over 320 million people can only create 80,000 jobs in a month. I am a "numbers person," I understand numbers more than flowery language. For every person in America, we created 0.00025 jobs.

Think of it another way. In a crowded ballpark of 50,000 screaming fans, just 12 people found a job last month! That is not counting the number of people that left the ballpark early, because they gave up on finding a job! Those numbers are about as hard to find as a company that is hiring.



12 people at Dodger Stadium are not very many. That is about 3 cars out of a sea of vehicles. Remember too, we are not taking into account the people that gave up and left the stadium early!



Why aren't companies hiring?

UNCERTAINTY!

I am certain about that, just ask any business owner.

No matter what the conservatives say; no matter what the liberals say; no matter what the moderates say; the final arbiter is the market. Here is what the market said about the jobs report:

- [Weak June Jobs Report Wraps Dismal Second Quarter](#)

If you're looking for something positive in the June report, it could simply be said that things didn't get worse.

It should be noted that above headline and byline comes from the very left leaning Yahoo.com.

We still have the July, August, September, and October job's reports before the big November election, and then America will vote. Something better change between now and then or there is likely to be a moving van parked in front of the Whitehouse next January.

Here is where the markets closed for the week:

	Fri. 6/29/12	Fri. 7/6/12	Week	Week Pct.
	Close	Close	Change	Change
S&P500	1362.16	1354.68	-7.48	-0.55%
DJIA	12,880.09	12,772.47	-107.62	-0.84%
NASD	2935.05	2937.33	2.28	0.08%
S&P600 (Small)	445.43	448.71	3.28	0.74%
Emg. Mkts (ADRE)	37.57	37.54	-0.03	-0.08%
Spain (EWP)	24.80	23.01	-1.79	-7.22%
Greek (GREK)	12.10	11.85	-0.25	-2.07%
U.S. 10yr. Tr.	1.66%	1.54%	-0.12%	7.23%
Greece 10yr. Bond	26.60%	26.14%	-0.46%	1.73%
Portugal 10yr. Bond	10.18%	10.08%	-0.10%	0.98%
Spain 10yr. Bond	6.94%	6.25%	-0.69%	9.94%
Oil	84.83	84.15	-0.68	-0.80%
Gold	1598.70	1583.00	-15.70	-0.98%

The U.S. equity markets were actually little changed for the week, while Spain had a very rough week. Commodities continue to go nowhere in a hurry (except corn). Interest rates at home remain near historic lows.



It appears that the market has broken out to the upside of that undecided wedge that it has been forming for the last several months. It could vanish just as quickly as it appeared however. Although it is important to know where the market is at all times, it is even more important to know where your individual holdings are.



Altisource (ASPS) still looks fine to me...



Ross Stores had another fantastic same store sales report this past week...



Folks are still looking to stretch a buck in a weak economy...



Leukemia remains a big issue at Pharmacyclics...



Consumers continue to use their credit cards...

SELL EVERYTHING-RIGHT! WRONG! It depends on what you own.

If you own a dog like Cisco Systems (CSCO)...



Then, that is another story.

Here is where the markets stand year-to-date...

	12/31/11	Fri. 7/6/12	2012	YTD Pct.
	Value	Close	YTD	Change
S&P500	1257.60	1354.68	97.08	7.72%
DJIA	12,239.74	12,772.47	532.73	4.35%
NASD	2610.68	2937.33	326.65	12.51%
S&P600 (Small)	415.07	448.71	33.64	8.10%
Emg. Mkts (ADRE)	39.89	37.54	-2.35	-5.89%
Spain (EWP)	30.37	24.91	-5.46	-17.98%
U.S. 10yr. Tr.	1.87%	1.54%	-0.33%	17.65%
Spain 10yr. Bond	5.22%	6.25%	1.03%	-19.73%
Oil	98.87	84.15	-14.72	-14.89%
Gold	1565.90	1583.00	17.10	1.09%

Still respectable, but it greatly depends upon what you are invested in!. I remain almost fully invested, but I am keeping the caution flag up for now. You still have to be very, very,very selective!



@billgunderson

Don't get any bad shrimp!

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](http://www.pwstreet.com) of my website: <http://www.pwstreet.com>



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



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

You can also download the *Tune In* app on any portable device and listen:



In addition to this we will also be downloading the shows to the radio archives on my website <http://pwstreet.com> and sending them to iTunes. You can also listen on the BEST STOCKS NOW App. Now you can listen while helping your wife do the dishes!



I think he said "ROST" Give me your Visa card-I'm going shopping!

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 **16.5%** YTD, while the S & P 500 is up **7.5%**. Cash level is now **9.8%** in this portfolio and I have one **inverse hedge** in place. This is the best roster of aggressive growth stocks that I can find in the market right now. No changes this week.

Gunderson Aggressive Growth Model Portfolio											
As of July 6, 2012 (8AM)											
16.5% YTD S&P 500 7.5% by 8.9%											
<u>Symbol</u>	<u>Name</u>	<u>Sector</u>	<u>Add Date</u>	<u>Add Price</u>	<u>Shares</u>	<u>Begin Value</u>	<u>Current Price</u>	<u>Current Value</u>	<u>G/L</u>	<u>Current Allocation</u>	
1	AAPL	Apple Comp.	Technology	5-Mar-10	\$218.95	8	\$1,752	\$604.26	\$4,834	176.0%	3.9%
2	AKRX	Akorn Inc.	Drug	1-Jun-12	\$13.36	348	\$4,649	\$15.97	\$5,558	19.5%	4.4%
3	ALLT	Allot Communications	Technology	20-Apr-12	\$23.57	210	\$4,950	\$26.30	\$5,523	11.6%	4.4%
4	ALXN	Alexion Pharmaceutical	Drug	22-Jun-12	\$95.95	51	\$4,893	\$100.64	\$5,133	4.9%	4.1%
5	ASPS	Altisource ptf Sftns.	Financial	15-Jun-12	\$84.13	73	\$6,141	\$75.06	\$5,479	-10.8%	4.4%
6	ATHN	Athenahealth Inc.	Medical	15-Jun-12	\$84.40	60	\$5,064	\$82.90	\$4,974	-1.8%	4.0%
7	CERN	Cerner	Medical	22-Jun-12	\$80.80	60	\$4,848	\$81.54	\$4,892	0.9%	3.9%
8	CRUS	Cirrus Logic	Technology	22-Jun-12	\$29.47	166	\$4,892	\$28.61	\$4,749	-2.9%	3.8%
9	DDD	Three D Systems Corp.	Technology	29-Jun-12	\$33.84	146	\$4,941	\$36.00	\$5,256	6.4%	4.2%
10	DLTR	Dollar Tree	Consumer	21-May-10	\$20.35	100	\$2,035	\$54.23	\$5,423	166.6%	4.3%
11	FDO	Family Dollar	Consumer	6-Apr-12	\$64.84	70	\$4,539	\$69.15	\$4,841	6.6%	3.9%
12	FXP	Inverse China 2:1	Inverse	22-Jun-12	\$29.88	163	\$4,870	\$28.03	\$4,569	-6.2%	3.7%
13	HIBB	Hibbett Sporting Goods	Consumer	11-May-12	\$60.28	82	\$4,943	\$58.73	\$4,816	-2.6%	3.9%
14	MDVN	Medivation	Drug	29-Jun-12	\$90.82	54	\$4,904	\$94.57	\$5,107	4.1%	4.1%
15	NEOG	Neogen	Drug	29-Jun-12	\$47.02	106	\$4,984	\$46.51	\$4,930	-1.1%	3.9%
16	PCYC	Pharmacyclics	Drug	25-May-12	\$32.85	145	\$4,763	\$58.16	\$8,433	77.0%	6.7%
17	QCOR	Questcor Pharm.	Drug	27-Apr-12	\$44.70	110	\$4,917	\$49.74	\$5,471	11.3%	4.4%
18	SLXP	Salix Pharmaceuticals	Medical	23-Mar-12	\$52.60	78	\$4,103	\$54.59	\$4,258	3.8%	3.4%
19	SXCI	S X C Health Solutions	Medical	9-Mar-12	\$73.02	66	\$4,819	\$96.21	\$6,350	31.8%	5.1%
20	VVUS	Vivus Inc.	Drug	18-May-12	\$22.40	205	\$4,592	\$28.44	\$5,830	27.0%	4.7%
21	TDG	Transdigm Group	Aerospace	27-Apr-12	\$127.14	40	\$5,086	\$130.85	\$5,234	2.9%	4.2%
CASH										9.8%	



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 risk profile, but still want growth. Time horizon of at least 3-5 years would be appropriate.

This portfolio is up **11.8%** year-to-date, while the S & P 500 is up **7.5%**. The portfolio currently has a **16.5%** cash position and one hedge position. No changes this week.

Conservative Growth Model as of 6/29/2012 **11.8%** S&P 500 **7.5%** Ahead by **4.3%**
 (As of 8:30AM PST)

Add	Date	Symbol	Name	Sector	Add Price	Shares	Beginning Value	Current Price	Current Value	G/L	Alloc.
1	6-Jan-12	AAPL	Apple Computer	Technology	\$422.40	9	\$3,802	\$603.77	\$5,434	42.9%	4.6%
2	29-Jun-12	ALXN	Alexion Pharm.	Drug	\$98.71	48	\$4,738	\$100.57	\$4,827	1.9%	4.1%
3	11-May-12	AMT	American Tower	Telecom	\$67.86	70	\$4,750	\$70.53	\$4,937	3.9%	4.1%
4	25-May-12	BIIB	Biogen	Drug	\$131.75	36	\$4,743	\$142.40	\$5,126	8.1%	4.3%
5	30-Sep-11	DG	Dollar General	Consumer	\$37.76	121	\$4,569	\$54.56	\$6,602	44.5%	5.5%
6	26-Aug-11	DLTR	Dollar Tree	Consumer	\$35.23	130	\$4,580	\$54.10	\$7,033	53.6%	5.9%
7	6-Apr-12	FDO	Family Dollar	Consumer	\$64.84	62	\$4,020	\$69.32	\$4,298	6.9%	3.6%
8	8-Jun-12	FXP	China Inverse 2:1	Inverse	\$31.06	150	\$4,659	\$28.07	\$4,211	-9.6%	3.5%
9	20-Apr-12	ISRG	Intuitive Surgical	Medical	\$575.60	8	\$4,605	\$552.36	\$4,419	-4.0%	3.7%
10	26-Aug-11	MA	Mastercard	Consumer	\$325.17	14	\$4,552	\$444.12	\$6,218	36.6%	5.2%
11	11-May-12	NVO	Novo Nordisk	Drug	\$145.73	32	\$4,663	\$146.40	\$4,685	0.5%	3.9%
12	8-Jun-12	PETM	Petsmart	Consumer	\$66.24	70	\$4,637	\$67.57	\$4,730	2.0%	4.0%
13	29-Jun-12	PRGO	Perrigo	Drug	\$117.46	40	\$4,698	\$118.15	\$4,726	0.6%	4.0%
14	1-Jun-12	PPG	P P G Industries	Basic Mat.	\$98.96	48	\$4,750	\$104.89	\$5,035	6.0%	4.2%
15	21-May-10	ROST	Ross Stores	Consumer	\$25.76	68	\$1,751	\$66.75	\$4,539	159.2%	3.8%
16	21-Oct-11	SBUX	Starbucks	Consumer	\$41.93	108	\$4,528	\$51.58	\$5,571	23.0%	4.7%
17	29-Jun-12	V	Visa	Finance	\$123.11	38	\$4,678	\$125.90	\$4,784	2.3%	4.0%
18	8-Jun-12	WFM	Whole Foods Mkt.	Consumer	\$90.67	52	\$4,715	\$94.90	\$4,935	4.7%	4.1%
19	7-Oct-11	TJX	T J Maxx	Consumer	\$27.77	164	\$4,553	\$44.28	\$7,262	59.5%	6.1%
										CASH	16.5%

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-averse 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!**

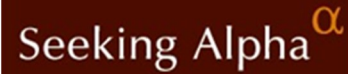
This portfolio is designed as **a bond or CD alternative**, albeit with more risk. This portfolio currently has an average yield of **6.5%**. Compare this with the current U.S. Treasury yield of 1.6% and current CD yields.

This portfolio is up **14.25%** since its August 5, 2011 inception. That works out to very nice **15.56%** annualized rate. Not bad for an income account No changes this week.

INCOME Model as of July 6, 2012 (9AM-PST)				7.68% YTD			S&P 500 7.37%		0.31%				
Inception Date August 5, 2011				14.25% Since Inception			S&P 500 12.58%		1.67%				
Added	Symbol	Name	Sector	Add Price	Adj.Buy Price	Shares	Beg. Value	Current Price	Current Value	G/L	Alloc.	Yield	
1	5-Aug-11	AGNC	Amer. Cap. Agency	Mortgage	\$28.35	\$23.73	176	\$4,990	\$34.29	\$6,035	44.5%	5.7%	15.3%
2	11-Nov-11	ACC	Amer. Campus Comm.	REIT	\$38.65	\$38.07	106	\$4,097	\$45.53	\$4,826	19.6%	4.6%	3.1%
3	13-Apr-12	AVB	Avalon Bay Comm.	REIT	\$140.70	\$140.15	32.0	\$4,502	\$144.05	\$4,610	2.8%	4.4%	2.8%
4	23-Mar-12	BTI	British Tobacco	Consumer	\$101.45	\$101.45	40.0	\$4,058	\$103.95	\$4,158	2.5%	3.9%	4.0%
5	8-Jun-12	CMO	Capstead Mortgage	REIT	\$14.14	\$14.14	300.0	\$4,242	\$13.98	\$4,194	-1.1%	4.0%	11.4%
6	4-May-12	EPD	Enterprise Products	Energy	\$52.47	\$52.47	75.0	\$3,935	\$51.42	\$3,857	-2.0%	3.7%	5.2%
7	5-Aug-11	KMP	Kinder Morgan	Energy	\$68.03	\$75.44	74	\$5,034	\$81.11	\$6,002	7.5%	5.7%	6.3%
8	13-Apr-12	LO	Lorillard	Consumer	\$138.88	\$127.17	32.0	\$4,444	\$135.92	\$4,349	6.9%	4.1%	5.2%
9	21-Oct-11	MMP	Magellan Mid. Ptrs.	Energy	\$63.02	\$67.23	64	\$4,033	\$70.77	\$4,529	5.3%	4.3%	5.0%
10	5-Aug-11	NHI	Nat. Health Investors	REIT	\$40.60	\$50.48	123	\$4,994	\$51.72	\$6,362	2.5%	6.0%	5.4%
11	8-Jun-12	NLY	Annaly Capital	REIT	\$16.70	\$16.91	250.0	\$4,175	\$17.03	\$4,258	0.7%	4.0%	13.2%
12	9-Sep-11	OKS	Oneok Ptrs.	Energy	\$43.29	\$41.39	91	\$3,939	\$55.88	\$5,085	35.0%	4.8%	4.8%
13	5-Aug-11	O	Realty Income	REIT	\$30.01	\$28.82	167	\$5,012	\$41.90	\$6,997	45.4%	6.6%	4.6%
14	5-Aug-11	OHI	Omega Healthcare	REIT	\$15.82	\$14.87	316	\$4,999	\$23.22	\$7,338	56.2%	7.0%	7.8%
15	9-Mar-12	PVD	Admin Fondos Pension	Finance	\$75.31	\$70.24	48.0	\$3,615	\$84.17	\$4,040	19.8%	3.8%	6.7%
16	11-May-12	SKT	Tanger Factory Outlet	REIT	\$32.59	\$32.59	140.0	\$4,563	\$32.25	\$4,515	-1.0%	4.3%	2.6%
17	8-Jun-12	TCAP	Triangle Capital Corp.	Finance	\$21.39	\$20.89	195.0	\$4,171	\$22.83	\$4,452	9.3%	4.2%	9.8%
18	11-May-12	TGH	Textainer Corp.	Trans.	\$36.63	\$36.22	123.0	\$4,505	\$38.16	\$4,694	5.4%	4.5%	4.4%
19	9-Mar-12	WES	Western Gas Partners	Energy	\$46.62	\$46.15	97.0	\$4,522	\$43.87	\$4,255	-4.9%	4.0%	3.7%
20	6-Jan-12	WHX	Whiting Usa Trust	Energy	\$17.83	\$16.41	240.0	\$4,279	\$17.93	\$4,303	9.3%	4.1%	17.4%
21	5-Aug-11	WPC	W P Carey	REIT	\$35.80	\$34.41	140	\$5,012	\$46.08	\$6,451	33.9%	6.1%	4.8%
22	5-Aug-11	CASH	Money Market	Cash	\$1.00	\$1.00	0	\$0	\$1.00	\$8,940	0.0%	8.5%	0.0%
											<u>6.5%</u>		

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% on accounts between \$250k and \$1 million, and 1% on accounts over \$1 million. Call us for a portfolio evaluation and more information. (760)736-8258.

Bill Gunderson is also columnist for *The Street.com*, *MarketWatch.com*, and *SeekingAlpha.com*

The logo for 'The Street' features the words 'The Street' in a bold, black, sans-serif font. The text is positioned above three horizontal black bars of varying lengths, which are aligned with the letters 't', 'r', and 'e' respectively.The logo for 'MarketWatch' features the word 'Market' in a black, sans-serif font, followed by 'Watch' in a larger, green, sans-serif font. A green upward-pointing arrow is integrated into the letter 'W'. Below the word 'Watch' is the text 'From DOWJONES' in a smaller, black, sans-serif font.The logo for 'Seeking Alpha' features the words 'Seeking Alpha' in a white, sans-serif font, with a small orange Greek letter alpha symbol to the right. The entire logo is set against a dark red rectangular background.

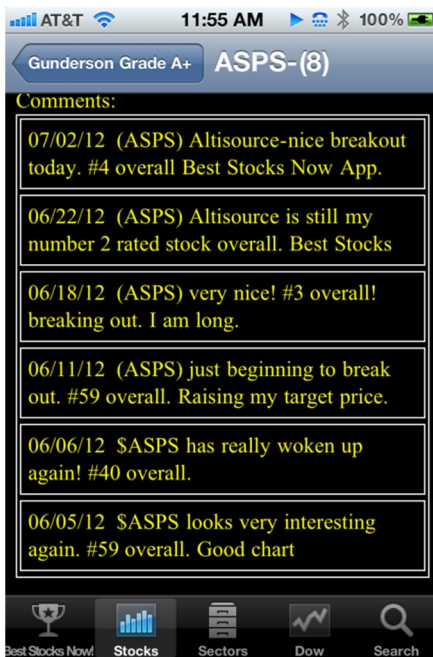
Bill Gunderson is now an award winning journalist. He took home the top prize from the Society of Professional Journalists-San Diego Chapter in the Op-Ed category.

Bill's latest op-ed was published in the San Diego Union Tribune on Friday. Here is a link to the article:

<http://www.utsandiego.com/news/2012/jul/05/green-energy-bad-idea-for-pension-funds/>

I currently have 2,816 stocks in my database. Every day when I am done doing my radio show, 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.



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.

GUNDERSON		Three	Two	Six	One	Two	One			
Best Stocks Now		Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Yest.	Current	
Top 200 7/5/2012		<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	
A+	IMGN	Immunogen Inc	207	1256	56	70	21	5	2	1
A+	PCYC	Pharmacyclics Inc	14	100	5	6	2	2	3	2
A+	SXCI	S X C Health Solutions	13	17	81	25	12	21	4	3
A+	PVD	Admin Fondos	83	49	92	73	15	3	6	4
A+	DG	Dollar General Corp	143	86	127	23	29	9	1	5
A+	VVUS	Vivus Inc	18	26	13	34	10	8	7	6
A+	DLTR	Dollar Tree Stores	29	4	19	4	11	1	5	7
A+	ASPS	Altisource	204	284	710	40	1	4	8	8
A+	ONXX	Onyx Pharmaceuticals Inc	485	370	268	229	13	7	9	9
A+	MDVN	Medivation	8	137	7	19	37	12	11	10
A	TDG	Transdigm Group Inc	49	10	21	38	33	27	10	11
A	ALXN	Alexion Pharmaceuticals	6	46	45	15	27	11	26	12
A	EW	Edwards Lifesciences Corp	279	44	57	43	14	19	22	13
A	AGNC	American Capital Agency	455	51	51	21	20	10	12	14
A	CERN	Cerner Corp	106	30	14	52	28	23	20	15
A	CRUS	Cirrus Logic Inc	86	16	18	24	6	22	13	16
A	AKRX	Akorn Inc.	301	233	33	39	59	20	38	17
A	BMRN	BioMarin Pharmaceutical	616	161	43	62	91	52	15	18
A	INCY	Incyte Corp	117	36	17	63	56	81	16	19
A	HMSY	HMS Hldgs Corp	220	563	366	101	127	166	28	20
A	NATH	Nathan's Famous Inc	737	54	70	44	16	14	18	21
A	PETM	Petsmart Inc	230	104	107	87	4	16	14	22
A	JJG	iPath? DJ-AIG Grains Total Return Sub-IndexS	0	0	0	0	0	60	30	23
A	CMN	Cantel Medical	342	668	159	102	44	54	59	24
A	SGEN	Seattle Genetics Inc	210	717	96	89	19	25	21	25
A	SLXP	Salix Pharmaceuticals Ltd	52	171	8	17	34	17	17	26
A	LL	Lumber Liquidators	9	69	62	85	32	42	37	27
A	CRIS	Curis Inc	302	680	300	69	39	36	34	28
A	LPSN	LivePerson Inc	68	142	72	30	100	101	134	29
A	ELGX	Endologix Inc	20	35	55	56	97	30	32	30
A	MNST	Monster Beverage Co.	42	22	1	7	18	24	23	31
A	HIBB	Hibbett Sporting Goods Inc	128	14	41	77	63	65	46	32
A	GNC	G N C Holdings	0	8	9	22	85	43	29	33
A	ALLT	Allot Communications	348	11	66	68	7	39	51	34
A	WRLS	Telular Corp	251	289	870	629	46	33	35	35
A	ATHN	Athenahealth	324	325	401	111	45	26	36	36
A	ARIA	Ariad Pharmaceuticals Inc	76	160	26	42	51	56	24	37
A	ULTI	Ultimate Software	107	47	31	97	9	13	27	38
A	AAPL	Apple Computer	17	45	38	14	22	35	25	39
A	NEOG	Neogen Corp	327	338	201	107	49	31	42	40
A	WFM	Whole Foods Market	191	57	63	66	35	28	43	41
A	IT	Gartner Inc Cl A	115	120	133	162	92	98	121	42
A	SHW	Sherwin-Williams Co	443	174	169	37	8	29	31	43
A	CORN	Corn Futures ETF	NA	NA	NA	NA		207	75	44
A	AIRM	Air Methods Corp	286	103	32	116	132	53	62	45
A	HPI	John Hancock Preferred Equity Income	715	153	567	223	71	86	47	46
A	ALGN	Align Tech Inc	105	56	39	100	48	55	50	47
A	CPHD	Cepheid	163	389	208	157	167	48	66	48
A	SBAC	SBA Communications Corp	209	70	216	136	70	58	40	49
A	CSTR	Coinstar	92	141	578	275	55	49	70	50

Best Stocks Now		Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Yest.	Current
Top 200 7/5/2012		<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>
A	PRGO Perrigo Co	120	74	108	88	26	32	33	51
A	OSUR OraSure Tech Inc	278	1488	797	579	731	394	188	52
A	AVD American Vanguard Corp	446	172	11	32	53	34	41	53
A	CNQR Concur Technology	786	78	58	74	31	47	45	54
A	AMT American Tower Corp	294	71	84	121	41	44	49	55
A	EQIX Equinix Inc	22	60	40	53	42	73	98	56
A	HWKN Hawkins Inc	263	1224	1005	481	118	80	56	57
A	MWIV M W I Veterinary Supply	74	61	101	120	88	37	57	58
A	QCOR Questcor Pharmaceutical	124	2	42	31	65	74	58	59
A	TYL Tyler Technologies Inc	71	129	105	72	54	62	61	60
A	BLIB Biogen Idec Inc	371	323	52	55	23	38	53	61
A	PDT John Hancock Patriot Prem Div Fd II	568	196	227	259	80	18	63	62
A	CQP Cheniere Energy Partners	374	20	138	1094	452	170	119	63
A	DDD Three D Systems	2640	2118	2013	2210	72	40	64	64
A	JBHT Hunt JB Trans Scvcs Inc	43	80	91	79	52	57	71	65
A	ROST Ross Stores Inc	80	15	30	46	24	46	44	66
A	DX Dynex Capital	704	258	425	267	94	71	108	67
A	SBH Sally Beauty Holdings	56	37	27	61	30	92	67	68
A	ADS Alliance Data Systems Corp	139	117	176	94	75	89	85	69
A	OSIS OSI Systems Inc	122	23	35	82	104	102	80	70
A	BGS B & G Foods	593	525	261	58	61	50	54	71
A	WYN Wyndham Worldwide Corp	131	40	69	80	64	68	68	72
A	ABMD Abiomed Inc	84	72	59	166	187	63	84	73
A	DXPE DXP Enterprises Inc	28	21	4	106	120	200	124	74
A	FMX Fomento Econ Mex Sab Ads	125	96	132	103	73	41	86	75
A	UNP Union Pacific Corp	233	167	99	150	86	82	69	76
A	VSI Vitamin Shoppe Inc.	459	303	54	41	89	59	72	77
A	HTWR Heartware Intl. Inc.	15	1	294	125	66	79	73	78
A	XBI Biotechnology Index	1563	1263	1265	1260	NULL	108	74	79
A-	AZZ AZZ Inc	500	330	37	235	107	84	257	80
A-	TCAP Triangle Cptial Corp.	NA	NA	NA	0	58	51	77	81
A-	CYNO Cynosure Inc.	178	299	431	332	278	235	221	82
A-	V Visa Inc.	101	125	195	78	84	115	52	83
A-	AOS Smith AO Corp	299	179	283	174	139	130	169	84
A-	CCI Crown Castle Intl Corp	594	348	564	139	76	64	76	85
A-	NVO Novo Nordisk A/S	30	43	83	182	67	45	60	86
A-	WSO Watsco Inc	173	298	418	222	101	132	102	87
A-	ABCO Advisory Board Company	262	186	44	213	79	112	97	88
A-	CRI Carters Inc	768	251	262	59	50	137	100	89
A-	POPE Pope Resources Ltd Ptnrs	1216	477	572	186	40	70	104	90
A-	CHD Church & Dwight Co Inc	332	133	95	122	201	171	198	91
A-	ISRG Intuitive Surgical	62	18	94	93	77	66	90	92
A-	VRSN Versign Inc	464	213	562	445	219	67	81	93
A-	BPT BP Prudhoe Bay Royalty Trust	69	140	333	258	134	103	92	94
A-	TTC Toro Co	252	272	349	144	175	265	105	95
A-	CRVL Corvel Corp	1918	1403	1019	538	169	88	55	96
A-	UTG Reaves Utility Income Fund	776	225	689	368	57	76	48	97
A-	VRSK Verisk Analytics		119	111	148	188	150	127	98
A-	WAB Wabtec Corp	194	121	272	301	176	126	115	99
A-	JHI John Hancock Investors Trust	343	131	204	170	164	75	82	100

GUNDERSON			Three	Two	Six	One	Two	One		
Best Stocks Now			Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Yest.	Current
Top 200 7/5/2012			<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>
A-	MA	Mastercard	45	77	173	119	38	83	93	101
A-	TGH	Textainer Group	552	154	122	280	267	61	95	102
A-	LORL	Loral Space	2111	1253	605	514	1072	202	150	103
A-	SWI	Solarwinds Inc.	90	216	16	127	60	218	87	104
A-	FDO	Family Dollar Stores Inc	72	50	97	71	62	72	88	105
A-	PCLN	Priceline.com Inc	23	39	73	142	82	85	106	106
A-	NEU	Newmarket Corp.	197	234	188	75	74	107	101	107
A-	UGP	Ultrapar Participacoes Adr	60	134	222	202	145	146	89	108
A-	DORM	Dormans	185	170	53	151	146	257	199	109
A-	LMNX	Luminex	215	227	352	414	93	90	79	110
A-	SRCL	Stericycle	507	409	533	217	241	203	91	111
A-	TNH	Terra Nitrogen Co Lp	1	64	197	132	131	161	78	112
A-	HTD	John Hancock Tax Advantage Dividend Incom	618	392	481	126	124	87	107	114
A-	KTF	DWS Municipal Income Trust	414	488	125	108	248	167	109	115
A-	LF	LeapFrog Enterprises Inc	344	447	36	118	109	119	103	116
A-	DISCA	Discovery Holding Co.	58	68	266	228	69	95	117	117
A-	INOD	Innodata Isogen Inc	456	240	215	727	83	113	110	118
A-	ITIC	Investors Title Co	551	300	359	464	430	139	112	119
A-	AME	Ametek Inc	223	203	175	130	125	180	65	120
A-	CTXS	Citrix Systems Inc	95	28	149	426	199	129	182	121
A-	TJX	TJX Co Inc	91	38	79	65	68	99	96	122
A-	ZUMZ	Zumiez	269	122	234	164	191	179	113	123
A-	EUO	Euro Vs. Dollar Inverse 2X	2281	903	74	2	152	204	255	124
A-	POOL	Pool Corp.		470	545	320	204	190	116	125
A-	IDXX	Idexx Labs	214	263	306	141	99	110	146	126
A-	VLT	Van Kampen High Income Trust II	130	94	143	129	143	151	165	127
A-	HAIN	Hain Celestial Grp	439	282	211	113	157	174	171	128
A-	TSCO	Tractor Supply Co	15	1	12	35	142	127	141	129
A-	VAL	Valspar Corp	212	185	350	274	140	120	114	130
A-	WES	Western Gas Partners	249	58	248	147	242	185	126	131
A-	KST	DWS Strategic Income Fund	465	318	548	493	200	159	128	132
A-	ISRL	Isramco Inc	208	380	552	115	25	69	111	133
A-	EPHC	Epoch Holding	298	614	680	167	180	221	140	135
A-	EXPO	Exponent Inc	356	456	223	134	150	228	192	136
A-	REGN	Regeneron Pharmaceuticals	12	3	29	8	108	121	122	137
A-	BTI	British American Tobacco Plc	155	101	256	420	122	118	132	138
A-	HYT	BlackRock Corporate High Yield Fund VI Inc.	521	214	400	376	177	231	164	139
A-	KMM	DWS Multi-Market Income Trust	792	342	482	459	273	143	162	140
A-	NTES	Netease.Com Inc Adr	16	29	68	95	102	156	193	141
A-	CMO	Capstead Mortg.	397	204	155	81	184	125	135	142
A-	JHX	James Hardee Industrial	995	804	755	914	212	77	129	143
A-	SAM	Boston Beer Company	554	322	207	262	198	182	138	144
A-	SYNT	Syntel Inc	111	76	289	159	193	117	123	145
A-	BFB	Brown Forman Corp Cl B	305	245	114	138	116	134	154	146
A-	SWM	Schweitzer-Mauduit Intl	198	175	88	105	126	165	144	147
A-	ABAX	Abaxis Inc	1362	455	89	336	96	100	158	148
A-	RDWR	Radware Limited	96	84	60	104	115	147	147	149

GUNDERSON			Three	Two	Six	One	Two	One		
Best Stocks Now			Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Yest.	Current
Top 200 7/5/2012			<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>
A- PII	Polaris Industries Inc		9	7	34	26	130	195	131	151
A- TESS	TESSCO Technologies Inc		177	359	255	146	203	114	153	152
A- TIBX	Tibco Software Inc		53	25	183	350	269	78	99	153
A- CIF	Colonial Intermediate High Income Fund		259	177	547	476	207	268	175	154
A- HYV	BlackRock Corporate High Yield Fund V Inc.		656	202	507	343	135	191	155	155
A- PCN	PIMCO Corporate Income Fund		1100	396	374	436	233	192	203	156
A- EZCH	Ezchip Semiconductor		2	180	170	168	141	116	133	157
A- HPF	John Hancock Preferred Income Fund II		597	187	595	250	123	181	160	158
A- HPS	John Hancock Preferred Income III		399	110	276	173	112	217	161	159
A- STON	Stomemor Partners		847	188	235	419	243	148	226	160
A- FIRE	Sourcefire Inc.		40	6	2	110	103	135	83	161
A- EXR	Extra Space Storage		375	274	504	153	158	177	218	162
A- BWLD	Buffalo Wild Wings Inc		34	98	115	109	223	274	157	163
A- AZO	AutoZone Inc		211	55	116	67	47	105	166	164
A- FL	Foot Locker Inc		241	181	117	91	293	220	172	165
A- OII	Oceaneering Intl Inc		154	492	356	402	428	238	167	166
A- HSTM	Healthstream		98	79	182	29	98	109	168	167
A- BFZ	BlackRock California Municipal Income Trust		1060	487	353	306	372	279	196	168
A- HD	Home Depot Inc		232	148	301	221	119	97	120	169
A- NLY	Annaly Capital		612	333	177	187	196	131	130	170
A- ANIK	Anika Therapeutics Inc		170	90	305	232	305	309	206	171
A- LKQ	LKQ Corp		457	95	0	60	78	201	213	172
A- ULTA	Ulta Salon		54	326	247	84	129	123	125	173
A- VASC	Vascular Solutions Inc		790	257	220	190	151	136	191	174
A- WPRT	Westport Innovations Inc.		1250	2207	2110	1597	591	305	216	175
A- LNKD	Linkedin Inc.		0	0	534	421	136	232	256	176
A- TITN	Titan Machinery		162	34	270	218	1256	495	209	177
A- PPG	P P G Industries			115	185	234	153	176	194	178
A- DKS	Dick's Sporting Goods Inc		82	92	334	194	185	138	176	179
A- MMU	Western Asset Managed Municipals Fund Inc		559	239	194	226	186	104	156	180
A- FFC	Flaherty Crm/Cly Pfd. Sec.		652	242	458	366	166	169	178	181
A- TLT	Treasuries US 20 year		1321	226	98	57	90	96	151	182
A- ECL	Ecolab Inc		536	314	167	200	170	158	214	183
A- LGF	Lions Gate Entertainment		167	463	141	261	202	187	181	184
A- PKO	Pimco Income Opp. Fund		1420	480	637	378	331	250	137	185
A- ANSS	Ansys Inc		78	237	264	179	162	173	163	186
A- FCFS	First Cash Financial Services		61	317	239	522	240	189	184	187
A- SBUX	Starbucks Corp		51	91	109	64	128	175	185	188
A- AFSI	Amtrust Fin. Svcs.		206	269	80	76	117	124	170	189
A- ENB	Enbridge		181	128	82	124	154	164	143	190
A- WHX	Whiting USA Trust I		681	355	287	83	284	111	139	191
A- CATM	Cardtronics		1254	266	147	296	320	199	223	192
A- MIDD	Middleby Corp		265	408	86	145	335	290	238	193
A- TRMB	Trimble Navigation Ltd		36	201	332	184	227	292	190	194
A- ODFL	Old Dominion Freight Lines		19	222	152	165	194	149	212	195
A- TWO	Two Harbors		1514	1348	1486	1237	137	163	142	196
A- DLR	Digital Realty Trust		0	367	368	330	147	142	217	197
A- AN	AutoNation Inc		533	559	186	155	245	343	179	198
A- KSU	Kansas City Southern		217	63	292	505	171	106	180	199
A- VTR	Ventas Inc.		412	316	198	247	189	141	204	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 41 Fidelity Mutual funds to my Best Stocks Now database that are representative of the categories listed above. I am grading them on a daily basis. I only want to own funds that are graded B+ or better and ranked 600 or higher, overall.

Of the 41 funds that I am tracking, I only have 7 that currently meet these criteria.

GUNDERSON				Suggested
Best Stocks Now				
401-K Allocation			Rank	Allocation
5-Jul-11				
A-	FBTAX	Fidelity Advisor Biotechnology A	134	20.0%
A-	PRHSX	T.Rowe Price Health Science	150	alternative
B+	FHEAX	Fidelity Advisor Real Estate A	319	15.0%
B+	FDFAX	Fidelity Select Consumer Staples	336	10.0%
B+	FLBIX	Fidelity Spartan L/T Tr Bd Idx Inv	483	15.0%
B+	FIBIX	Fidelity Spartan Intern Tr Bd Idx Inv	632	15.0%
B+	FINPX	Fidelity Inflation-Protected Bond	633	15.0%
B+	FHCCX	Fidelity Advisor Health Care C	640	10.0%
B+	FGBTX	Fidelity Advisor Investment Gr Bd T	674	0.0%
		CASH		0.0%
				100.0%

Notice that there are no Large Cap, Mid Cap, Small Cap (although they are rising), International, or Natural Resource funds in my top 600 right now. This is extremely valuable information as it relates to choosing you allocation right now! Do the best you can with the choices that you have!

The only sectors that come up right now are Biotech (life science) Real Estate, Healthcare, and consumer staples. No other sectors are currently listed. This is also very valuable information.

Tips, Government Bonds, and Corporate Bonds dominate the list right now. This is also extremely valuable information. You will have to look at the choices within your 401-k and do the best that you can.

INTERNATIONAL AND EMERGING MARKET WATCH:

As of July 6, 2012

		<u>2012 ytd</u>
Vietnam	VNM	21.3%
Thailand	THD	13.7%
Mexico	EWV	12.9%
Peru	EPU	9.5%
India	INP	9.1%
United States	^GSPC	7.4%
Japan	EWJ	2.1%
Chile	CH	0.7%
Europe	EFA	-0.5%
Emerging Mkts.	ADRE	-1.5%
Russia	RSX	-2.1%
Canada	EWC	-2.5%
China	FXI	-4.5%
Brazil	EWZ	-9.3%
Italy	EWI	-12.1%
Greece	GREK	-15.5%
Spain	EWP	-24.4%

COMMODITIES (as of July 6, 2012)

		<u>2012 YTD</u>
Grains	JJG	24.7%
Corn	CORN	8.5%
Gold	GLD	1.4%
Copper	JJC	-1.5%
Silver	SLV	-2.4%
Steel	SLX	-5.5%
Oil	USO	-16.8%
Cotton	BAL	-17.7%
Coal	KOL	-21.1%

Watch for Bill Gunderson on:



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.

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	\$45.99	\$4,507	-1.2%	6-Jan-12
2	EGOV	N I C Inc.	Technology	28-Oct-11	\$14.23	317	\$4,511	\$11.92	\$3,779	-16.2%	3-Feb-12
3	WRLD	World Acceptance	Financial	30-Dec-11	\$73.50	59	\$4,337	\$65.48	\$3,863	-10.9%	10-Feb-12
4	RDEN	Elizabeth Arden	Consumer	28-Oct-11	\$35.13	128	\$4,497	\$39.23	\$5,021	11.7%	17-Feb-12
5	DG	Dollar General	Consumer	30-Sep-11	\$37.76	118	\$4,456	\$42.23	\$4,983	11.8%	17-Feb-12
6	HEK	Heckman Corp.	Energy	18-Dec-11	\$6.74	648	\$4,368	\$5.19	\$3,363	-23.0%	2-Mar-12
7	SMP	Standard Motor Prod.	Automotive	23-Dec-11	\$20.73	211	\$4,374	\$20.65	\$4,357	-0.4%	9-Mar-12
8	LKQX	L K Q Corp.	Consumer	7-Oct-11	\$26.79	169	\$4,528	\$31.68	\$5,354	18.3%	9-Mar-12
9	MNRO	Monroe Muffler	Consumer	10-Feb-12	\$44.24	90	\$3,982	\$41.85	\$3,767	-5.4%	23-Mar-12
10	QSII	Quality Systems	Medical	26-Aug-11	\$44.22	97	\$4,289	\$42.38	\$4,111	-4.2%	23-Mar-12
11	NUS	Nu Skin Enterprises	Consumer	40767	39.58	60	2374.8	58.57	3514.2	48.0%	6-Apr-12
12	CLH	Clean Harbors	Energy	8-Apr-11	\$51.78	84	\$4,350	\$66.33	\$5,572	28.1%	6-Apr-12
13	NUS	Nu Skin Enterprises	Consumer	12-Aug-11	\$39.58	60	\$2,375	\$56.79	\$3,407	43.5%	6-Apr-12
14	DPZ	Domino's Pizza	Consumer	16-Sep-11	\$28.28	170	\$4,808	\$35.14	\$5,974	24.3%	13-Apr-12
15	GEOI	Georesources	Energy	3-Feb-12	\$32.13	142	\$4,562	\$30.74	\$4,365	-4.3%	13-Apr-12
16	PETM	Petsmart	Consumer	21-Oct-11	\$47.41	95	\$4,504	\$56.55	\$5,372	19.3%	13-Apr-12
17	AAPL	Apple Comp.	Technology	5-Mar-10	\$218.95	3	\$657	\$614.41	\$1,843	180.6%	13-Apr-12
18	ALXN	Alexion Pharm.	Medical	26-Aug-11	\$54.68	27	\$1,476	\$89.70	\$2,422	64.0%	13-Apr-12
19	PCLN	Priceline.com	Leisure	29-Oct-11	\$376.23	4	\$1,505	\$736.19	\$2,945	95.7%	13-Apr-12
20	FCFS	First Cash Financial	Financial	1-Apr-11	\$38.61	110	\$4,247	\$38.99	\$4,289	1.0%	20-Apr-12
21	TPX	Tempur Pedic	Consumer	6-Apr-12	\$85.80	50	\$4,290	\$59.59	\$2,980	-30.5%	27-Apr-12
22	PIR	Pier One Imports	Consumer	6-Jan-12	\$15.00	286	\$4,290	\$17.87	\$5,111	19.1%	4-May-12
23	VLTR	Volterra Semiconductor	Technology	17-Feb-12	\$31.88	128	\$4,081	\$30.51	\$3,905	-4.3%	4-May-12
24	TYL	Tyler Technologies	Technology	14-Oct-11	\$28.33	160	\$4,533	\$37.38	\$5,981	31.9%	11-May-12
25	PEET	Peet's Coffee	Consumer	20-May-11	\$48.55	83	\$4,030	\$64.00	\$5,312	31.8%	11-May-12
26	ACFN	Acorn Energy	Energy	30-Mar-12	\$10.87	355	\$3,859	\$9.10	\$3,231	-16.3%	18-May-12
27	RGR	Sturm Ruger	Leisure	11-May-12	\$50.21	98	\$4,921	\$42.49	\$4,164	-15.4%	18-May-12
28	BWLD	Buffalo Wild Wings	Consumer	2-Mar-12	\$87.07	38	\$3,309	\$82.31	\$3,128	-5.5%	18-May-12
29	STX	Seagate Technology	Technology	17-Feb-12	\$26.87	152	\$4,084	\$25.99	\$3,950	-3.3%	25-May-12
30	PCLN	Priceline.com	Leisure	29-Oct-11	\$376.23	7	\$2,634	\$656.00	\$4,592	74.4%	25-May-12
31	CLB	Core Labs	Energy	27-Apr-12	\$136.02	37	\$5,033	\$122.86	\$4,546	-9.7%	1-Jun-12
32	PII	Polaris Industries	Consumer	28-Oct-11	\$62.71	72	\$4,515	\$69.96	\$5,037	11.6%	15-Jun-12
33	TSCO	Tractor Supply	Consumer	11-May-12	\$98.94	50	\$4,947	\$87.77	\$4,389	-11.3%	15-Jun-12
34	AZO	Autozone	Consumer	8-Oct-10	\$232.81	9	\$2,095	\$382.76	\$3,445	64.4%	22-Jun-12
35	EFZ	Europe Inverse 1:1	Inverse	25-May-12	\$51.98	92	\$4,782	\$50.28	\$4,626	-3.3%	22-Jun-12
36	EUM	Emg. Mkts Inverse 1:1	Inverse	18-May-12	\$33.32	138	\$4,598	\$31.81	\$4,390	-4.5%	22-Jun-12
37	GNC	General Nutrition	Consumer	11-May-12	\$40.67	121	\$4,921	\$37.08	\$4,487	-8.8%	22-Jun-12
38	LQDT	Liquidity Services	Consumer	20-Apr-12	\$52.20	95	\$4,959	\$50.18	\$4,767	-3.9%	22-Jun-12
39	MNST	Monster Beverage	Consumer	11-May-12	\$71.28	69	\$4,918	\$71.57	\$4,938	0.4%	29-Jun-12
40	NTESE	Netease.com	Leisure	23-Mar-12	\$59.59	73	\$4,350	\$59.19	\$4,321	-0.7%	29-Jun-12
41	REGN	Regeneron Pharm.	Drug	20-Apr-12	\$127.10	39	\$4,957	\$113.92	\$4,443	-10.4%	29-Jun-12
42	SBH	Sally Beauty Hldg.	Consumer	21-Oct-11	\$18.80	239	\$4,493	\$25.42	\$6,075	35.2%	29-Jun-12

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	Autozone	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

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	Commoditie	\$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	AMPLP	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	
11	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
20	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

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