

Bill Gunderson's Weekly "Best Stocks Now" Newsletter

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

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Bill@pwstreet.com Let me hear from you!

October 12, 2012



San Diego, CA

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

Time to Sell Everything?

The market got a little bit soggy this past week. We are now entering into that vortex of the unknown. The two biggest questions hanging over the market right now are: "who will occupy the oval office in January and which of the Bush tax cuts will be extended and which ones won't?"



From where I sit, the market had been pretty certain of an Obama win, until the big debate happened last week. Now the market is moving around rapidly, playing a much more plausible "what-if" game. That was one of the big reasons why the market seemed so uncertain of itself this past week.

In addition to this, we are not any closer to a resolution of the Bush tax cuts than we were last week. They are still set to expire for everyone on December 31. On this date, big cuts will automatically take place in defense spending and social programs.

The combination of the tax hikes and the spending cuts would have a *major impact* on our economy. Everyone one is just taking it for granted that Congress won't be able to reach some kind of compromise before the clock strike midnight, and the economy turns into a pumpkin. But then again, has Congress been able to compromise on much else?

I heard an interview with former Senators Bowles and Simpson who were co-chairs of *President Obama's National Commission on Fiscal Responsibility and Reform*. I hate to say it, but they did not seem too optimistic about a timely compromise.

One side wants all of the tax cuts to remain until the economy improves, while the other side wants to extend the cuts for all except those that earn \$250,000 or more per year. Both sides have their heels dug in and are not budging, while the clock continues to tick and tick, and tick...

I did hear some rumblings of lowering the threshold to \$1 million in income, so I continue to keep my fingers crossed for a resolution. Why does of all this even matter? It is because the tax cuts apply to dividends, capital gains, and estate taxes. All of these are a major factor on the stock market.

Lastly, we have now entered into earnings season. The global economy continues to grind to a halt. As of now, I don't see any plan domestically for growing our part of the economy. The global economy cannot grow without U.S. leading the way. I am sorry, but printing money and expanding social programs are not a recipe for economic growth. When economies stall out, markets stall out-it is as simple as that.

On the bright side, it is clear to me that the housing market has bottomed, is starting to head back up, and is gathering a bit of steam-more on that in a bit. The uncertainty above is finally creating a bit of volatility in the market for the first time since spring of this year.

IS IT TIME TO SELL EVERYTING AND JUST GO TO CASH?



Okay, it's not quite that bad, but I did have to take a few tums this past week.



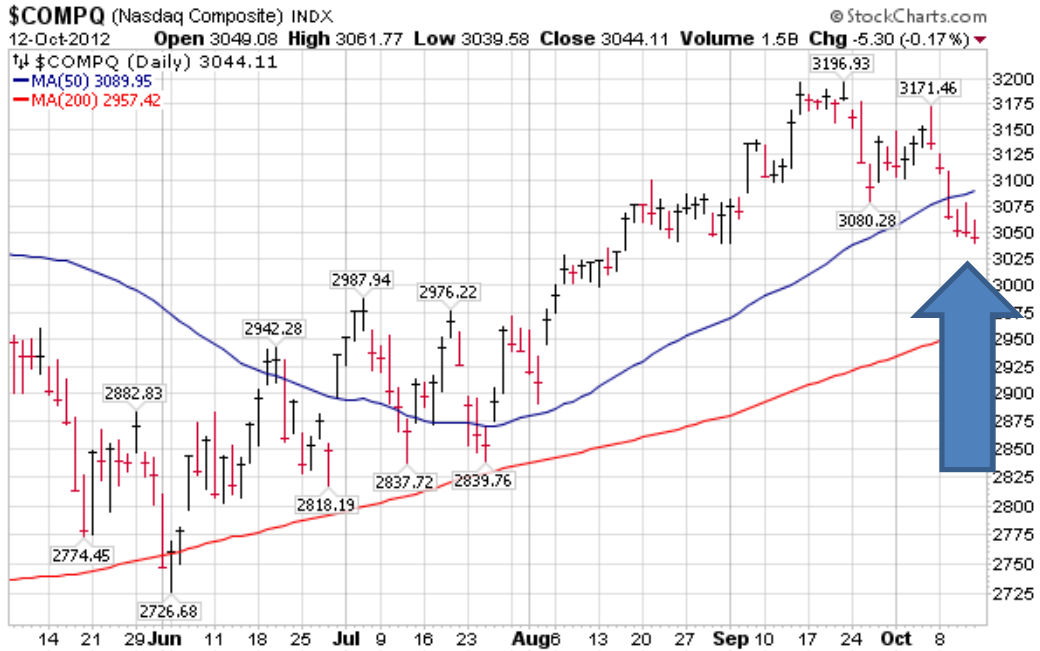
S & P 500?

Let's take a look at how the markets fared for the week:

	Fri. 10/5/12	Fri. 10/12/12	Week	Week Pct.
	Close	Close	Change	Change
S&P500	1460.93	1428.59	-32.34	-2.21%
DJIA	13,610.15	13,328.46	-281.69	-2.07%
NASD	3136.19	3044.11	-92.08	-2.94%
S&P600 (Small)	470.26	458.26	-12.00	-2.55%
S&P400 (Mid-Cap)	996.35	975.63	-20.72	-2.08%
Emg. Mkts (ADRE)	39.45	38.97	-0.48	-1.22%
Spain (EWP)	28.81	27.63	-1.18	-4.10%
Italy (EWI)	12.73	12.40	-0.33	-2.59%
Greece (GREK)	16.89	16.38	-0.51	-3.02%
U.S. 10yr. Tr.	1.73%	1.66%	-0.07%	4.05%
Greece 10yr. Bond	19.74%	18.22%	-1.52%	7.70%
Italy 10yr. Bond	5.17%	5.06%	-0.11%	2.13%
Spain 10yr. Bond	5.97%	5.71%	-0.26%	4.36%
Oil	89.93	91.64	1.71	1.90%
Gold	1780.80	1755.40	-25.40	-1.43%

As you can see, it was all RED this past week except for the Bond Markets and Oil.

The first chart I want to show you this week, is that of the NASDAQ:



As you can see, the NASDAQ has dropped below its 50 day moving for the first time since the July.

Before we panic and head for the exits, let's take a look at the S & P 500.



As you can see, the S&P 500 is still above its 50 day moving average.

So is the Dow:



Meanwhile, some market leaders are starting to roll over:



Apple (AAPL) is a stock that I sold out of my Aggressive accounts a few weeks ago and my Conservative accounts this week. Apple is now below its 50 day moving average.

Ross Stores (ROST) which I sold last week is starting to look ugly.



TJ Maxx (TJX) which I sold earlier this week is following the same path.



While other leaders are holding up fine:





So is it time to sell everything and go to cash? I take it one stock at a time. As of this moment, selling everything makes little sense, unless you can't sleep at night. Selective selling makes total sense, however.

I will continue to be vigilant on every stock that my clients own on a daily basis. I was very active this past week in making changes to my portfolios as leaders began to sell off. You will see the changes when we get to the model portfolios.

Before we get there, let's have a look at where the markets are year-to-date:

	12/31/11	Fri. 10/12/12	2012	YTD Pct.
	Value	Close	YTD	Change
S&P500	1257.60	1428.59	170.99	13.60%
DJIA	12,239.74	13,328.46	1088.72	8.89%
NASD	2610.68	3044.11	433.43	16.60%
S&P600 (Small)	415.07	458.26	43.19	10.41%
S&P400 (Mid-Cap)	879.16	970.16	91.00	10.35%
Emg. Mkts (ADRE)	39.89	38.97	-0.92	-2.31%
Spain (EWP)	30.37	27.63	-2.74	-9.02%
U.S. 10yr. Tr.	1.87%	1.66%	-0.21%	11.23%
Spain 10yr. Bond	5.22%	5.71%	0.49%	-9.39%
Oil	98.87	91.64	-7.23	-7.31%
Gold	1565.90	1755.40	189.50	12.10%

As you can see, the numbers don't look quite as good as last week, but they are still *very respectable*. A tax deal to prevent the fiscal cliff on December 31 would really help and I would not be surprised to see one ironed out BEFORE Election Day.



I think that it is prudent to keep the yellow flag flying, but I still remain almost fully invested for now, just as I have been all year. It is also vital to be invested in the **BEST STOCKS NOW...** wherever they may be!



@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>



My Best Stocks Now Radio Hour is heard on the Salem Broadcast Network every weekday from 7:00am to 8:00am PST.

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



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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. There is no excuse to not keep up on your investments!



Everything?"

"Did Gunderson Say to Sell

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 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 **15.0%** year-to-date (after all trading and mgt. fees, while the S & P 500 is up **13.6%** (as of 12:00pm on Friday), and the Dow is up **9.1%**. I sold Apple on Monday, Directv on Tuesday, Amer. Cap Agency on Wednesday, and T J Maxx on Thursday. I added Companhia Brasileira on Monday. The net result is that I obviously raised some cash this past week.

Conservative Growth Model as of 10/12/2012
12:00PM

15.00% S&P 500 **13.60%** Ahead by **1.40%**
-0.5% DJIA **9.10%** Ahead by **5.90%**

(Net of all Trading Costs and a 2% annual mgt fee)

	<u>Add</u>				<u>Add</u>	<u>Adjusted</u>		<u>Beginning</u>	<u>Current</u>	<u>Current</u>	<u>G/L</u>	<u>Alloc.</u>
	<u>Date</u>	<u>Symbol</u>	<u>Name</u>	<u>Sector</u>	<u>Price</u>	<u>Price</u>	<u>Shares</u>	<u>Value</u>	<u>Price</u>	<u>Value</u>		
1	29-Jun-12	ALXN	Alexion Pharm.	Drug	\$98.71	\$98.71	48	\$4,738	\$111.55	\$5,354	13.0%	3.9%
2	11-May-12	AMT	American Tower	Telecom	\$67.86	\$67.86	70	\$4,750	\$72.09	\$5,046	6.2%	3.7%
3	31-Aug-12	AMZN	Amazon.com	Consumer	\$248.92	\$248.92	19	\$4,729	\$242.62	\$4,610	-2.5%	3.4%
4	25-May-12	BIIB	Biogen	Drug	\$131.75	\$131.75	36	\$4,743	\$147.42	\$5,307	11.9%	3.9%
5	8-Oct-12	CBD	Companhia Brasileira	International	\$48.47	\$48.47	112	\$5,429	\$48.47	\$5,422	-0.1%	4.0%
6	31-Aug-12	CNI	Canadian Natl. Railway	Transport.	\$91.99	\$91.99	52	\$4,783	\$88.66	\$4,610	-3.6%	3.4%
7	31-Aug-12	ESRX	Express Script	Medical	\$62.73	\$62.73	76	\$4,767	\$63.61	\$4,834	1.4%	3.6%
8	31-Aug-12	EW	Edwards Lifesciences	Medical	\$102.18	\$102.18	46	\$4,700	\$87.44	\$4,022	-14.4%	3.0%
9	21-Aug-12	UNP	Union Pacific	Transport.	\$125.19	\$125.19	38	\$4,757	\$120.99	\$4,598	-3.4%	3.4%
10	17-Aug-12	GILD	Gilead Sciences	Drug	\$56.42	\$56.42	84	\$4,739	\$67.86	\$5,700	20.3%	4.2%
11	17-Aug-12	HD	Home Depot	Consumer	\$57.10	\$57.10	83	\$4,739	\$59.53	\$4,941	4.3%	3.6%
12	5-Oct-12	FMX	Fomento Econ Mex	International	\$94.79	\$94.79	59	\$5,593	\$39.08	\$5,492	-1.8%	4.0%
13	11-May-12	NVO	Novo Nordisk	Drug	\$145.73	\$145.73	32	\$4,663	\$160.49	\$5,136	10.1%	3.8%
14	8-Jun-12	PETM	Petsmart	Consumer	\$66.24	\$66.24	70	\$4,637	\$69.26	\$4,848	4.6%	3.6%
15	29-Jun-12	PRGO	Perrigo	Drug	\$117.46	\$117.46	40	\$4,698	\$117.38	\$4,695	-0.1%	3.5%
16	1-Jun-12	PPG	P P G Industries	Basic Mat.	\$98.96	\$98.96	48	\$4,750	\$113.65	\$5,455	14.8%	4.0%
17	21-Sep-12	GOLD	Randgold Resources	Basic Mat.	\$123.21	\$123.21	29	\$3,573	\$121.82	\$3,533	-1.1%	2.6%
18	27-Jul-12	REGN	Regeneron Pharm.	Drug	\$137.91	\$137.91	34	\$4,689	\$151.12	\$5,138	9.6%	3.8%
19	24-Aug-12	SLW	Silver Wheaton	Basic Mat.	\$34.08	\$34.08	139	\$4,737	\$39.08	\$5,432	14.7%	4.0%
20	29-Jun-12	V	Visa	Finance	\$123.11	\$123.11	38	\$4,678	\$139.10	\$5,286	13.0%	3.9%
21	28-Sep-12	WPI	Watson Pharmaceutical	Drug	\$85.76	\$85.76	63	\$5,403	\$86.80	\$5,468	1.2%	4.0%

All changes made to the portfolio this year can be found later in the newsletter.

Bill Gunderson's Model Portfolio for Investors seeking AGGRESSIVE Growth



Are you Aggressive?

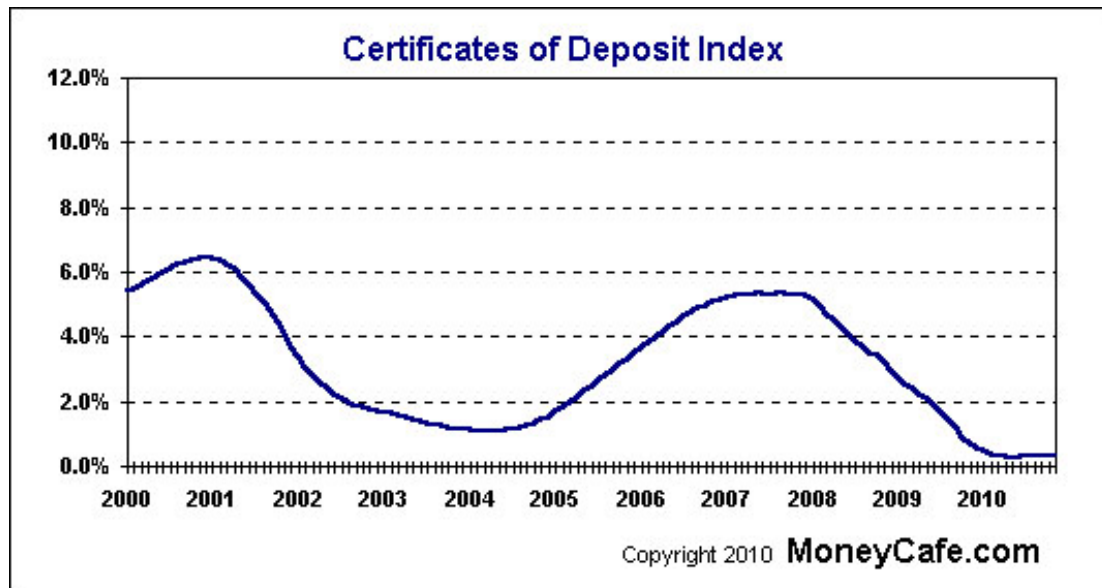
This is my most aggressive portfolio. It is designed for investors with long-term time horizons, seeking maximum growth. This portfolio is made up mainly of small and mid-cap stocks with superior growth potential.

This portfolio is much more volatile than the *Conservative Growth Portfolio* and the *Income/Growth 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 **16.2% YTD (after all trading fees and mgt. expenses)**, while the S & P 500 is up **13.6%** and the S&P 600 small-cap index is up **10.4%**. **Lots of changes again this week:**

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

Bill Gunderson's Model Portfolio for investors seeking Income along with the possibility of Growth. This is a good mix for retirees who are seeking a CD alternative-albeit with greater risk.



Three-month CD rate chart

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 6.3%. Compare this with the current U.S. Treasury yield of 1.8% and current CD yields.

This portfolio is up **14.7%** since its August 5, 2011 inception, not bad for a CD alternative/income account. The current yield is approximately **5.6%**. I sold

THIS SECTION FOR CLIENTS AND SUBSCRIBER ONLY

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 info. (855)611-BEST.

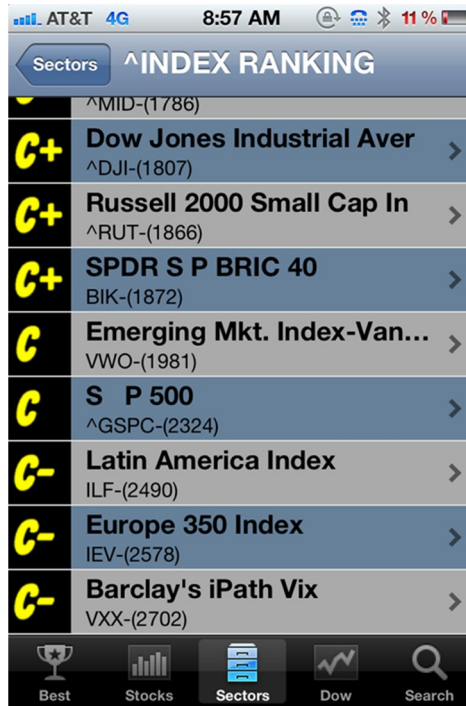
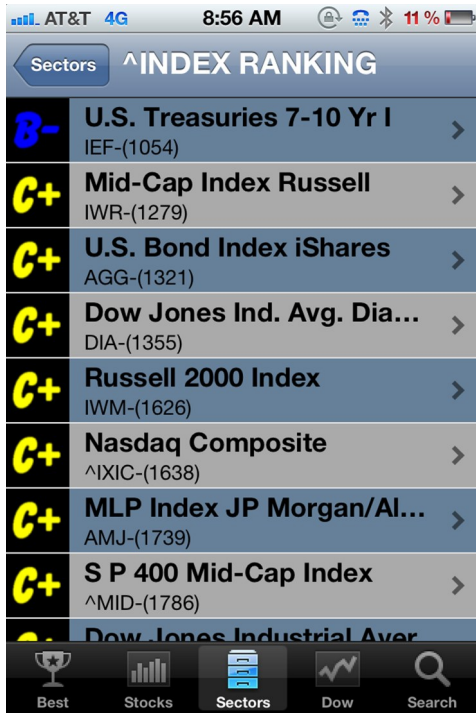
Top ranked asset classes

Rating	Asset Class	Symbol
B	Silver	SLV-(369)
B	Emerging Mkt. Debt Index	PCY-(436)
B	Gold Bullion	GLD-(651)
B-	U.S. Treas. 20+ Index	TLT-(662)
B-	Corp. Bond Inv.Gr. Index	LQD-(850)
B-	Goldminer's Index	GDX-(921)
B-	Nasdaq 100 Index	QQQ-(1040)
B-	Inflation Protected Treas	TIP-(1048)
B-	National Muni Bond Index	

Bottom ranked asset classes

Rating	Asset Class	Symbol
	VB	VB-(1619)
C+	U.S. Short Treas. Bond In	SHV-(1747)
C+	Commodity Index	DBC-(1769)
C+	Emerging Mkt Index	ADRE-(1901)
C	Intl.Small-Cap Div.Index	DLS-(2103)
C	Emg.Mkts.Small-Cap Ind...	EWX-(2473)
C-	Micro-Cap Index Dow Jo...	FDM-(2556)
C-	Private Equity Listed Ind	PSP-(2615)
D	S P 500 Inverse	SH-(2998)

Precious metals, emerging market debt, LT bonds, and Tech stocks lead the way again this week. ST bonds, commodities in general, emerging markets remain at the bottom. The S&P 500 is NEUTRAL right now-hence the yellow flag. Being SHORT the market is the worst place to be.



The treasury, mid-cap, small-cap, and NASDAQ indexes continue to sit at the top. Europe, Latin America, and emerging markets still sit at the bottom of the indexes.



Biotech, Pharmaceutical, Healthcare, and Consumer Staples are the current leading sectors. By nature, these are defensive sectors. Clean Energy, Investment services, Financials, Oil Equipment continue to bring up the rear.

Data from Best Stocks Now App

Bill Gunderson is also columnist for *The Street.com*, *MarketWatch.com*, and *SeekingAlpha.com*. Here are links to this week's articles that I wrote:

The logo for 'The Street' features the words 'The Street' in a bold, black, sans-serif font. Below the text are three horizontal black bars of varying lengths, creating a stylized underline.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 arrow points upwards from the 'a' in 'Watch'. Below the main text is the phrase 'From DOWJONES' in a smaller, black, sans-serif font.The logo for 'Seeking Alpha' features the words 'Seeking Alpha' in a white, serif font, with a small orange Greek letter alpha symbol to the right. The entire logo is set against a dark red background.

Investing

This Housing Recovery Is Real

- [Add Comment](#)
By [Bill Gunderson](#) 10/11/12 - 06:30 AM EDT

Stock quotes in this article: [LEN](#), [DHI](#), [HD](#), [PCYC](#), [TTC](#), [ITB](#), [ALXN](#)

http://www.thestreet.com/story/11733922/1/this-housing-recovery-is-real.html?cm_ven=GOOGLN

I track just over 3,000 stocks, funds, eff's, etc. I spend several hours looking at them each day. 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). I like Performance and Value. Here is a good example of what I mean by this...

AT&T 4G 8:58 AM 11%

Search shf

BEST STOCKS NOW! APP

Weider Nutrition Intl Inc

Sector	Consumer
Market Cap	718,320,000
Size	Small-Cap
Risk Profile	Aggressive

Valuation 10/12/12

Last Closing Price	\$24.47
Next Yr EPS Est	\$1.20
Forward PE Ratio	20.39
Est 5Yr Annual Gr	34.10%

Best Stocks Sectors Dow Search

AT&T 4G 8:58 AM 11%

Search shf

Valuation 10/12/12

Last Closing Price	\$24.47
Next Yr EPS Est	\$1.20
Forward PE Ratio	20.39
Est 5Yr Annual Gr	34.10%
PEG Ratio	0.60
5Year Target Price	\$47.00
Dividend Yield	0.00%
5Yr Tot Ret Pot	92.1%

Gunderson Value Grade

A-

Best Stocks Sectors Dow Search

AT&T 4G 8:58 AM 11%

Search shf

Performance of shf vs S&P 500

1 Mo Total Return	21.0%	-0.6%
3 Mo Total Return	33.6%	7.0%
12 Mo Total Return	109.0%	18.3%
Momentum Grade	A+	C
3 Yr Avg Tot Ret	70.3%	9.9%
5 Yr Avg Tot Ret	40.2%	-1.8%
10 Yr Avg Tot Ret	37.7%	5.5%
Performance Grade	A+	C
2008 Total Return	4.1%	-38.5%
Safety Grade	d+	C

Best Stocks Sectors Dow Search

AT&T 4G 8:58 AM 10%

Search shf

Gunderson Stock Grade

A+

Ranking

Current	2 / 3042
1 day ago	3
7 days ago	48
1 month ago	374
2 months ago	450
3 months ago	252

Best Stocks Sectors Dow Search

Data from Best Stocks Now App

Schiff Nutrition International, Inc. develops, manufactures, markets, and distributes vitamins, nutritional supplements, and nutrition bars in the United States and internationally. The company offers a line of specialty supplements, vitamins, and minerals under the Schiff brand. Its specialty supplements include joint care products under the Move Free brand and glucosamine products; omega-3 products under the MegaRed brand; a line of probiotic digestive health products under the Digestive Advantage and Sustenex brands; immune support products under the Airborne brand; and various other specialty supplements. The company's specialty supplement products also comprise omega-3 products, such as fish oil; specialty products, including prostate health and folic acid for men and women; and other specialty products, such as melatonin ultra, niacin, and acidophilus. In addition, it offers vitamin products, including multivitamins; individual vitamins, such as vitamin B, vitamin C, and mega-D3; and minerals comprising calcium and iron. Further, the company manufactures and distributes private label products primarily for retail customers that include specialty supplements; vitamins; and minerals, such as joint care products, vitamin B, and calcium citrate. Additionally, it offers nutrition bars that supply protein, vitamins, and other essential nutrients with fewer calories under the Tiger's Milk brand. Schiff Nutrition International, Inc. sells its products directly, as well as through brokers and independent distributors. The company was founded in 1996 and is based in Salt Lake City, Utah.



BILL GUNDERSON WEEKLY TOP 200 LIST:

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY-HERE ARE 150-200



Bill Gunderson's

Best Stocks Now Top 200 as of 10/12/2012

			Six	Three	Two	Six	One	Two	One		
			Mos. Ago	Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Yest.	Current
			<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>	<u>Rank</u>
B+	BIIB	Biogen Idec Inc	353	67	123	74	60	185	147	158	151
B+	NTES	Netease.Com Inc ADR	37	201	391	876	1229	189	173	150	152
B+	AMT	American Tower Corp	272	65	119	147	93	157	166	142	153
B+	NEU	Newmarket Corp.	589	73	135	179	73	151	288	200	154
B+	ROP	Roper Industries Inc	434	310	197	382	497	239	248	160	155
B+	ACAT	Arctic Cat Inc	78	243	22	91	37	110	291	161	156
B+	ROST	Ross Stores Inc	53	61	88	79	144	204	232	162	157
B+	ABG	Asbury Automotive Group Inc	364	541	353	210	154	120	171	198	158
B+	USNA	USANA Health Sciences Inc	707	246	126	219	101	245	255	130	159
B+	ADS	Alliance Data Systems Corp	121	64	159	109	118	238	163	151	160
B+	DEST	Destination Maternity	799	1151	610	627	424	514	856	206	161
B+	MDRX	Allscripts Hlthcare Sln	1286	1734	655	1202	1535	324	254	173	162
B+	BGS	B & G Foods	698	74	56	48	63	167	237	191	163
B+	IBB	Biotech Index	0	0	0	196	128	136	120	147	164
B+	LKQ	LKQ Corp	600	196	41	102	188	169	123	129	165
B+	TCBI	Texas Capital Bancshares	457	420	798	319	416	332	217	137	166
B+	ATAX	America First Tax Exempt	766	857	779	581	896	616	318	211	167
B+	IT	Gartner Inc CIA	127	43	21	22	18	181	311	175	168
B+	FFIV	F5 Networks Inc	73	700	106	142	466	67	105	102	169
B+	FOSL	Fossil Inc	31	1050	151	87	375	366	112	177	170
B+	RYOIX	Rydex Biotech Class I	2524	1507	2367	139	113	137	121	179	171
B+	MFV	MFS Special Value Trust	886	597	342	959	785	624	673	280	172
B+	MXF	Mexico Fund	1021	587	627	1147	621	259	83	180	173
B+	ALLT	Allot Communications	29	307	82	71	242	285	540	181	174
B+	IPGP	IP G Photonics	0	0	42	81	28	230	137	183	176
B+	AZO	AutoZone Inc	109	124	186	328	288	249	180	143	177
B+	UNP	Union Pacific Corp	250	104	109	150	50	224	164	188	178
B+	AMZN	Amazon.com Inc	504	314	506	131	183	304	129	201	179
B+	KTCC	Key Tronic Corp	111	259	758	138	116	188	204	172	180
B+	ASNA	Ascena Retail Group	75	564	396	70	88	53	96	164	181
B+	RXL	U S Hlthcre Idx 2X	0	410	423	341	185	119	63	156	182
B+	SXL	Sunoco Logistic Parnters	162	190	130	90	79	126	104	220	183
B+	UA	Under Armour	132	340	4	11	231	247	215	165	184
B+	WYN	Wyndham Worldwide Corp	176	140	211	159	125	311	169	298	185
B+	FNV	Franco-Nevada Corp.	0	0	0	292	159	95	236	116	187
B+	BIB	Biotech Sector 2x	1778	2049	1734	2234		56	2780	117	188
B+	GRA	Grace WR & Co	199	363	263	258	373	336	366	199	189
B+	ARLP	Alliance Res Corp Lp	994	431	334	296	487	433	253	286	190
B+	SHOO	Stephen Madden	319	842	169	281	294	173	244	232	191
B+	RAX	Rackspace Holding Inc.	129	973	32	36	81	135	309	205	192
B+	MANH	Manhattan Assoc Inc	669	595	561	585	396	217	205	207	193
B+	RGLD	Royal Gold Inc	442	351	336	265	521	148	182	168	194
B+	URBN	Urban Outfitters Inc	565	701	318	99	109	159	245	178	195
B+	ADC	Agree Realty	1275	675	323	234	302	319	202	159	196
B+	FDO	Family Dollar Stores Inc	43	128	176	719	408	257	209	186	197
B+	TJX	TJX Co Inc	52	84	145	149	138	271	289	229	198
B+	MNST	Monster Beverage Co.	21	38	753	875	635	757	484	520	199

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 of 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.

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

INTERNATIONAL AND EMERGING MARKET WATCH:

As of Oct. 12, 2012

		<u>2012 ytd</u>
India	INP	25.2%
Thailand	THD	26.2%
Mexico	EWV	24.2%
Greece	GREK	16.8%
Peru	EPU	15.1%
United States	AGSPC	13.6%
Russia	RSX	7.7%
Europe	EFA	7.4%
Vietnam	VNM	11.7%
Canada	EWC	8.8%
Italy	EWI	6.8%
Emerging Mkts.	ADRE	4.4%
Chile	CH	2.7%
China	FXI	1.8%
Japan	EWJ	0.9%
Spain	EWP	-8.7%
Brazil	EWZ	-5.9%

COMMODITIES (as of Oct. 12, 2012)

		<u>2012 YTD</u>
Grains	JJG	28.9%
Gasoline	UGA	24.5%
Silver	SLV	20.5%
Corn	CORN	14.5%
Gold	GLD	11.9%
Copper	JJC	6.3%
Livestock	COW	-6.2%
Steel	SLX	-7.0%
Oil	USO	-10.8%
Cotton	BAL	-16.6%
Coal	KOL	-22.6%

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.

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

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!

Talk to Craig! (855) 900-EASY"

To order my book, Best Stocks Now, click the link below:

<http://pwstreet.com/book/>

To set up and appointment with me, click the link below:

<http://pwstreet.com/contact-us/>

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