

Bill Gunderson's Weekly "Best Stocks Now" Newsletter

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

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September 14, 2012



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

Bernanke Busts Open the Pinata-Who Benefits?

What is a piñata you say?



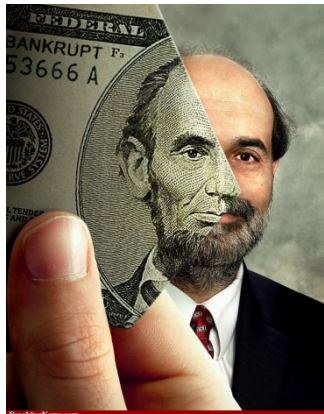
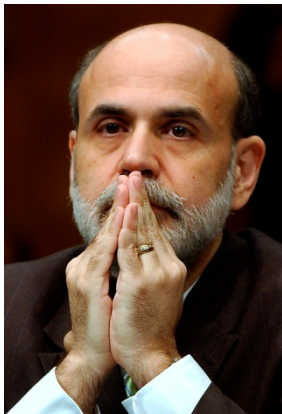
Here is one that has been hanging over Wall St. for several months ! The masses of investors below have been waiting for the piñata to break open, and the mad scramble for candy that ensues...

We just needed someone with a big enough stick to break it open while the candy dangled high above us. The candy that the U.S. fed doles out is not cheap, it has to be borrowed from China or our future generations.

It is only to be used during times of dire emergency. Almost everyone running for re-election in November has been clamoring for the candy to reign down from the heavens, but nobody had a big enough stick. The FED said that “we do not get involved in politics...”



Helicopter Ben pondered:



and pondered... Then he acted boldly and **“courageously...”**

He grabbed his extra-large club and with a powerful thud, he hit the start button to the printing presses and the candy rained down on the masses that have become so addicted to these extra-strength shots of performance enhancers!

The stock market opened up the expensive champagne, exported from France to China and then imported back to us.



Equities all over the world celebrated in glee:



Just as the cork to the bubbly burst, so did the lid to the stock market. I have been telling you for weeks that it was coming. I even said one month ago, **that it was time to put your foot on the accelerator!**

European markets, still drunk with Draghi's powerful cocktail also toasted our good fortune...



They partied way down in commodity-rich Brazil...



Oil-rich Russia danced the night away!



Gasoline has been the number one performing asset during the President's administration-it continued to party late into the night...



Gold, already drunk with the all of the *pre-parties* blasted off again...



The only party pooper was the poor U.S. dollar...



It looks downright worried!

The cost of a good steak could soar...



Why ruin this plate with broccoli?

Even the price of a Big Mac could break out...



But at least we will finally know how many calories there are between those sesame seed buns, never mind the price!

And don't forget, in New York, you are only allowed sixteen ounces of your favorite sugary drink now...



So what does this all mean for you 401-k, your IRA, your Roth, your trust account, your kid's college funds?

You have to continue to be fully invested in markets for now. That has been the right place to be since the TARP bailout, and it is still the right place to be-for now...

It also means that the current one year cycle that has been in place in the market is transitioning into a new cycle. I have been warning you that this was coming.

While Europe was coming unraveled, our dollar has been rising since August of last year. This was bad for commodities, international markets, and emerging markets.

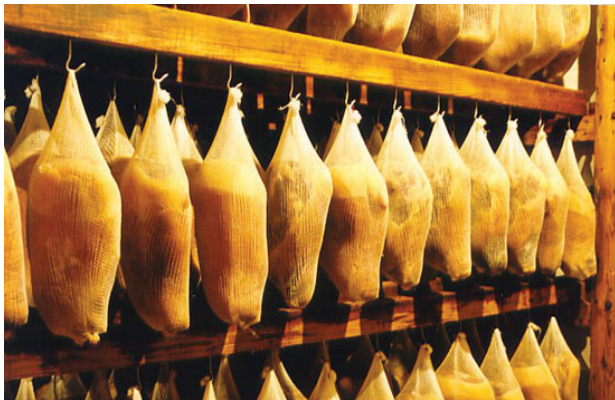


That cycle has now been broke and a new cycle is emerging. Look for the dollar to go back to its old lows unless something drastic like a war in the mid-east breaks out. But, we just have to take it one day at a time for now.

For now, the Euro is perceived to be a “safer” place than the Dollar. The Euro is back on top.



Again this is bullish for foreign stocks and commodities. But there is no use in going **hog-wild** just yet. You have heard the old saying... "hogs can get slaughtered."



Just ask these poor guys.

I am beefing up on oil stocks. They are starting to party likes it is 1999...



I already own this one-Oceaneering Intl.

(OII).

I added Oil States (OIS) to most of my aggressive portfolios this past week.



Even a stodgy ol' stock of yesteryear like Exxon (XOM) is breaking out like a good-looking, young growth stock!



With the oil stocks, you have both Quantitative Easing III, and the bubbling cauldron called the middle-east covered.

Let's take a look at the final scorecard for the week:

	Fri. 9/7/12	Fri. 9/14/12	Week	Week Pct.
	Close	Close	Change	Change
S&P500	1437.92	1465.77	27.85	1.94%
DJIA	13,306.17	13,593.37	287.20	2.16%
NASD	3136.42	3183.95	47.53	1.52%
S&P600 (Small)	473.97	485.66	11.69	2.47%
S&P400 (Mid-Cap)	1004.60	1026.85	22.25	2.21%
Emg. Mkts (ADRE)	38.89	40.52	1.63	4.19%
Spain (EWP)	28.37	29.93	1.56	5.50%
Italy (EWI)	12.78	13.39	0.61	4.77%
Greece (GREK)	13.76	15.22	1.46	10.61%
U.S. 10yr. Tr.	1.66%	1.87%	0.21%	-12.65%
Greece 10yr. Bond	21.96%	20.90%	-1.06%	4.83%
Italy 10yr. Bond	5.67%	5.01%	-0.66%	11.64%
Spain 10yr. Bond	6.57%	5.66%	-0.91%	13.85%
Oil	98.13	99.03	0.90	0.92%
Gold	1740.50	1770.00	29.50	1.69%

Let's see, Greece up 10.6%, Spain up 5.5%, **our dollar gets clobbered**, it costs them much less to borrow, **and it now costs U.S. more to borrow money!** It seem like the Fed's actions helped the International community more than U.S. I'll bet China is gleeful...

Nevertheless, U.S. investor still got their *fair share* of the candy. Here is where the markets stand year-to-date...

	12/31/11	Fri. 9/14/12	2012	YTD Pct.
	Value	Close	YTD	Change
S&P500	1257.60	1465.77	208.17	16.55%
DJIA	12,239.74	13,593.37	1353.63	11.06%
NASD	2610.68	3183.95	573.27	21.96%
S&P600 (Small)	415.07	485.66	70.59	17.01%
S&P400 (Mid-Cap)	879.16	970.16	91.00	10.35%
Emg. Mkts (ADRE)	39.89	40.52	0.63	1.58%
Spain (EWP)	30.37	24.91	-5.46	-17.98%
U.S. 10yr. Tr.	1.87%	1.87%	0.00%	0.00%
Spain 10yr. Bond	5.22%	5.66%	0.44%	-8.43%
Oil	98.87	99.03	0.16	0.16%
Gold	1565.90	1770.00	204.10	13.03%

The Emerging Markets (ADRE) finally turned green for the year, but just barely. Our markets have far outperformed them, but just like the St. Louis Cardinals of last year, foreign markets, aided by the Fed could make a run for the playoffs before the season is over.

Our ten year treasury is right back where it began the year, oil is also starting to move into positive territory for the year, it could have a lot further to go...

The candy is still everywhere, it is not time to clean up the mess yet, *the party continues in the market –for now...*

Obviously being fully invested this year, and since 2009 has been the right place to be- I have been.

It makes logical sense to still remain fully invested. Just remember to seek out 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>



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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!



"Harry, what is quantitative easing? Does that help me?"

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 **17.0%** year-to-date (after all trading and mgt. fees, while the S & P 500 is up **16.7%** (as of 11:30am on Friday), and the Dow is up 11.2%%. **No changes this week.**

Conservative Growth Model as of 9/14/2012 **17.02%** S&P 500 **16.68%** Ahead by **0.34%**
 11:30AM DJIA **11.23%** Ahead by **5.79%**
 (Net of all Trading Costs and a 2% annual mgt fee)

	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	\$696.09	\$6,265	64.8%	5.3%
2	13-Jul-12	AGNC	American Cap. Agency	Finance	\$34.50	138	\$4,761	\$36.37	\$5,019	5.4%	4.2%
3	29-Jun-12	ALXN	Alexion Pharm.	Drug	\$98.71	48	\$4,738	\$111.07	\$5,331	12.5%	4.5%
4	11-May-12	AMT	American Tower	Telecom	\$67.86	70	\$4,750	\$71.73	\$5,021	5.7%	4.2%
5	31-Aug-12	AMZN	Amazon.com	Consumer	\$248.92	19	\$4,729	\$260.17	\$4,943	4.5%	4.2%
6	25-May-12	BIIB	Biogen	Drug	\$131.75	36	\$4,743	\$153.25	\$5,517	16.3%	4.6%
7	31-Aug-12	CNI	Canadian Natl. Railway	Transport.	\$91.99	52	\$4,783	\$94.08	\$4,892	2.3%	4.1%
8	10-Aug-12	DTV	Directv Cl A	Media	\$51.86	90	\$4,667	\$54.07	\$4,866	4.3%	4.1%
9	31-Aug-12	ESRX	Express Script	Medical	\$62.73	76	\$4,767	\$62.60	\$4,758	-0.2%	4.0%
10	31-Aug-12	EW	Edwards Lifesciences	Medical	\$102.18	46	\$4,700	\$105.44	\$4,850	3.2%	4.1%
11	21-Aug-12	UNP	Union Pacific	Transport.	\$125.19	38	\$4,757	\$127.95	\$4,862	2.2%	4.1%
12	17-Aug-12	GILD	Gilead Sciences	Drug	\$56.42	84	\$4,739	\$62.03	\$5,211	9.9%	4.4%
13	17-Aug-12	HD	Home Depot	Consumer	\$57.10	83	\$4,739	\$59.22	\$4,915	3.7%	4.1%
14	27-Jul-12	NLY	Annaly Mortgage	Finance	\$17.44	273	\$4,761	\$17.49	\$4,775	0.3%	4.0%
15	11-May-12	NVO	Novo Nordisk	Drug	\$145.73	32	\$4,663	\$153.60	\$4,915	5.4%	4.1%
16	8-Jun-12	PETM	Pet smart	Consumer	\$66.24	70	\$4,637	\$69.43	\$4,860	4.8%	4.1%
17	29-Jun-12	PRGO	Perrigo	Drug	\$117.46	40	\$4,698	\$112.73	\$4,509	-4.0%	3.8%
18	1-Jun-12	PPG	P P G Industries	Basic Mat.	\$98.96	48	\$4,750	\$119.13	\$5,718	20.4%	4.8%
19	27-Jul-12	REGN	Regeneron Pharm.	Drug	\$137.91	34	\$4,689	\$150.23	\$5,108	8.9%	4.3%
20	21-May-10	ROST	Ross Stores	Consumer	\$25.76	68	\$1,751	\$67.99	\$4,623	164.0%	3.9%
21	24-Aug-12	SLW	Silver Wheaton	Basic Mat.	\$34.08	139	\$4,737	\$39.26	\$5,457	15.2%	4.6%
22	29-Jun-12	V	Visa	Finance	\$123.11	38	\$4,678	\$134.35	\$5,105	9.1%	4.3%
23	7-Oct-11	TJX	T J Maxx	Consumer	\$27.77	164	\$4,553	\$46.32	\$7,596	66.8%	6.4%
		CASH								-0.1%	

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



My aggressive photo this week relates to money printing. It is really easy-some try it at home...Bernanke has made it Christmas in September.

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.

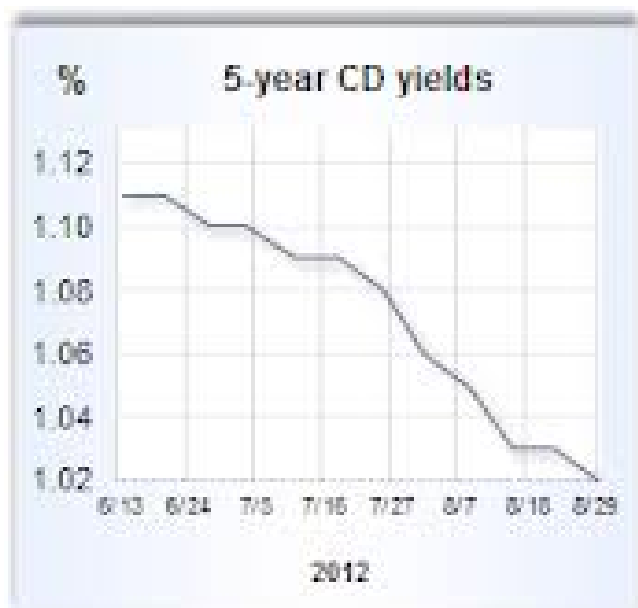
This portfolio is up **15.9% YTD (after all trading fees and mgt. expenses)**, while the S & P 500 is up **16.8%** and the S&P 600 small-cap index is up **17.0%** Cash level is now **0.2%**. I sold H MS Holdings (HMSY) and replaced it with Oil States (OIS). The red-hot healthcare related stocks will more than likely start to cool off as commodity related stocks begin to assume leadership.

Gunderson Aggressive Growth Model Portfolio
As of 9/14/12-8:30AM

15.91% YTD **S&P 500 16.75%** Ahead **-0.84%**
Small-Cap **S&P 600 17.02%** by **-1.11%**
(Net of all trading fees and an annual mgt. fee of 2.0%)

Symbol	Name	Sector	Add Date	Add Price	Shares	Begin Value	Current Price	Current Value	G/L	Current Allocation
1 ALXN	Alexion Pharmaceutical	Drug	22-Jun-12	\$95.95	51	\$4,893	\$111.16	\$5,669	15.9%	4.6%
2 AIRM	Air Methods	Healthcare	27-Jul-12	\$110.47	42	\$4,640	\$119.24	\$5,008	7.9%	4.1%
3 ARIA	Ariad Pharmaceutical	Drug	22-Aug-12	\$19.97	239	\$4,773	\$22.91	\$5,475	14.7%	4.4%
4 ASPS	Altisource ptf SItns.	Financial	15-Jun-12	\$67.40	73	\$4,920	\$90.20	\$6,585	33.8%	5.3%
5 ATHN	Athenahealth Inc.	Medical	15-Jun-12	\$84.40	60	\$5,064	\$91.53	\$5,492	8.4%	4.4%
6 AVD	American Vanguard	Basic Mat.	13-Jul-12	\$28.32	170	\$4,814	\$31.56	\$5,365	11.4%	4.3%
7 CAB	Cabela's	Consumer	27-Jul-12	\$45.31	103	\$4,667	\$53.36	\$5,496	17.8%	4.5%
8 CBST	Cubist Pharmaceuticals.	Drug	24-Aug-12	\$45.65	104	\$4,748	\$48.33	\$5,026	5.9%	4.1%
9 DDD	Three D Systems Corp.	Technology	29-Jun-12	\$33.84	146	\$4,941	\$39.93	\$5,830	18.0%	4.7%
10 EQIX	Equinix Inc.	Technology	10-Aug-12	\$180.92	22	\$3,980	\$197.52	\$4,345	9.2%	3.5%
11 GTLS	Chart Industries	Energy	17-Aug-12	\$73.97	64	\$4,734	\$73.38	\$4,696	-0.8%	3.8%
13 MDVN	Medivation	Drug	29-Jun-12	\$90.82	54	\$4,904	\$101.25	\$5,468	11.5%	4.4%
14 MLNX	Mellanox Technologies	Technology	27-Jul-12	\$102.29	46	\$4,705	\$103.18	\$4,746	0.9%	3.8%
15 NEU	Newmarket Corp.	Energy	20-Jul-12	\$231.94	20	\$4,639	\$255.18	\$5,104	10.0%	4.1%
16 OII	Oceaneering Intl.	Energy	20-Jul-12	\$50.44	94	\$4,741	\$57.78	\$5,431	14.6%	4.4%
17 OCN	Ocwen Financial	Financial	17-Aug-12	\$24.87	192	\$4,775	\$27.39	\$5,259	10.1%	4.3%
18 OIS	Oil States Intl.	Energy	14-Sep-12	\$86.65	32	\$2,773	\$86.65	\$2,773	0.0%	2.2%
19 PCYC	Pharmacyclics Inc.	Drug	14-Aug-12	\$59.50	80	\$4,760	\$64.06	\$5,125	7.7%	4.2%
20 REGN	Regeneron Pharm.	Drug	31-Aug-12	\$145.96	32	\$4,671	\$149.65	\$4,789	2.5%	3.9%
21 RGR	Sturm Ruger	Consumer	27-Jul-12	\$46.56	102	\$4,749	\$48.47	\$4,944	4.1%	4.0%
22 SWKS	Skyworks	Technology	31-Aug-12	\$30.23	154	\$4,655	\$29.52	\$4,546	-2.3%	3.7%
23 CTRX	Catamaran Corp.	Medical	9-Mar-12	\$73.02	66	\$4,819	\$95.46	\$6,300	30.7%	5.1%
24 TTC	Toro Co.	Building	20-Jul-12	\$39.55	120	\$4,746	\$39.81	\$4,777	0.7%	3.9%
25 TDG	Transdigm Group	Aerospace	27-Apr-12	\$127.14	40	\$5,086	\$144.33	\$5,773	13.5%	4.7%

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.



Ouch!

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 **17.4%** since its August 5, 2011 inception, not bad for an income account. The current yield is approximately **5.8%**. I replaced WP Carey (WPC) with Two Harbors (TWO) earlier in the week. Mortgage backed securities have been a huge beneficiary of Helicopter Ben.

INCOME Model as of Sept. 14, 2012 10AM **9.76% YTD** **S&P 500 11.74%** **-3.00%**
Inception Date August 5, 2011 **17.43%** **Since Inception** **S&P 500 22.35%** **-4.93%**
(Net of trading costs and 2% annual mgt fee)

	<u>Add</u>	<u>Symbol</u>	<u>Name</u>	<u>Sector</u>	<u>Add Price</u>	<u>Adj.Buy Price</u>	<u>Shares</u>	<u>Beg. Value</u>	<u>Current Price</u>	<u>Current Value</u>	<u>G/L</u>	<u>Alloc.</u>	<u>Curr. Yield</u>
1	5-Aug-11	AGNC	Amer. Cap. Agency	Mortgage	\$28.35	\$23.73	176	\$4,990	\$36.40	\$6,406	53.4%	5.8%	13.8%
2	11-Nov-11	ACC	Amer. Campus Comm.	REIT	\$38.65	\$38.07	106	\$4,097	\$46.30	\$4,908	21.6%	4.5%	2.9%
3	13-Apr-12	AVB	Avalon Bay Comm.	REIT	\$140.70	\$140.15	32.0	\$4,502	\$143.16	\$4,581	2.1%	4.2%	2.7%
4	23-Mar-12	BTI	British Tobacco	Consumer	\$101.45	\$101.45	40.0	\$4,058	\$102.89	\$4,116	1.4%	3.7%	4.1%
5	8-Jun-12	CMO	Capstead Mortgage	REIT	\$14.14	\$14.14	300.0	\$4,242	\$14.47	\$4,341	2.3%	4.0%	10.0%
6	13-Jul-12	DLR	Digital Realty Trust	Real Estate	\$78.48	\$78.48	57.0	\$4,473	\$75.01	\$4,276	-4.4%	3.9%	3.9%
7	4-May-12	EPD	Enterprise Products	Energy	\$52.47	\$52.47	75.0	\$3,935	\$54.11	\$4,058	3.1%	3.7%	4.7%
8	13-Jul-12	HCN	Health Care REIT	Real Estate	\$60.58	\$60.58	73.0	\$4,422	\$59.37	\$4,334	-2.0%	3.9%	5.0%
9	5-Aug-11	KMP	Kinder Morgan	Energy	\$68.03	\$75.44	74	\$5,034	\$82.82	\$6,129	9.8%	5.6%	5.9%
10	13-Apr-12	LO	Lorillard	Consumer	\$138.88	\$127.17	32.0	\$4,444	\$116.66	\$3,733	-8.3%	3.4%	5.3%
11	21-Oct-11	MMP	Magellan Mid. Ptrs.	Energy	\$63.02	\$67.23	64	\$4,033	\$86.90	\$5,562	29.3%	5.1%	4.3%
12	5-Aug-11	NHI	Nat. Health Investors	REIT	\$40.60	\$50.48	123	\$4,994	\$53.38	\$6,566	5.7%	6.0%	5.0%
13	8-Jun-12	NLY	Annaly Capital	REIT	\$16.70	\$16.91	250.0	\$4,175	\$17.48	\$4,370	3.4%	4.0%	12.6%
14	9-Sep-11	OKS	Oneok Ptrs.	Energy	\$43.29	\$41.39	91	\$3,939	\$58.53	\$5,326	41.4%	4.8%	4.5%
15	5-Aug-11	O	Realty Income	REIT	\$30.01	\$28.82	167	\$5,012	\$42.16	\$7,041	46.3%	6.4%	4.3%
16	5-Aug-11	OHI	Omega Healthcare	REIT	\$15.82	\$14.87	316	\$4,999	\$24.91	\$7,872	67.5%	7.2%	6.8%
17	9-Mar-12	PVD	Admin Fondos Pension	Finance	\$75.31	\$70.24	48.0	\$3,615	\$95.29	\$4,574	35.7%	4.2%	5.8%
18	11-May-12	SKT	Tanger Factory Outlet	REIT	\$32.59	\$32.59	140.0	\$4,563	\$33.95	\$4,753	4.2%	4.3%	2.5%
19	8-Jun-12	TCAP	Triangle Capital Corp.	Finance	\$21.39	\$20.89	195.0	\$4,171	\$24.98	\$4,871	19.6%	4.4%	8.3%
20	11-May-12	TGH	Textainer Corp.	Trans.	\$36.63	\$36.22	123.0	\$4,505	\$31.69	\$3,898	-12.5%	3.5%	5.3%
21	14-Sep-12	TWO	Two Harbors Inv.	REIT-Mort.	\$11.96	\$11.96	278.0	\$3,325	\$11.96	\$3,325	0.0%	3.0%	12.0%
22	9-Mar-12	WES	Western Gas Partners	Energy	\$46.62	\$46.15	97.0	\$4,522	\$49.80	\$4,831	7.9%	4.4%	3.8%
23	5-Aug-11	CASH	Money Market	Cash	\$1.00	\$1.00	0	\$0	\$1.00	\$5,509	0.0%	4.8%	0.0%
													5.8%

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.

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

Market**W**atch
From **DOWJONES**

Seeking Alpha α

THIS WEEK'S ARTICLES:



Investing

The Best Performing Asset Under Obama

By [Bill Gunderson](#) 09/12/12 - 02:58 PM EDT

<http://www.thestreet.com/story/11698347/1/the-best-performing-asset-under-obama.html>

Jobs Are Being Created In Ohio By Companies Like Chart Industries

<http://seekingalpha.com/article/851201-jobs-are-being-created-in-ohio-by-companies-like-chart-industries>

Last week's article

<http://www.marketwatch.com/story/is-it-time-to-romnify-your-portfolio-2012-08-30>

I track just over 2,900 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...

The image shows two screenshots of a mobile application interface. The left screenshot shows the 'Oil States Intl' stock page with a 'BEST STOCKS NOW! APP' banner. The right screenshot shows the 'Gunderson Value Grade' stock page with a 'C+' rating. Both pages display a table of financial metrics.

Oil States Intl	
Sector	Energy
Market Cap	4,740,000,000
Size	Mid-Cap
Risk Profile	Moderate
Valuation 09/14/12	
Last Closing Price	\$86.65
Next Yr EPS Est	\$8.24
Forward PE Ratio	10.52
Est 5Yr Annual Gr	38.80%
PEG Ratio	0.27
5Year Target Price	\$150.00
Dividend Yield	0.00%
5Yr Tot Ret Pot	73.1%

Gunderson Value Grade	
C+	

AT&T 4G 1:23 PM

Search ois

Performance of ois vs S&P 500		
1 Mo Total Return	10.2%	4.4%
3 Mo Total Return	29.3%	10.3%
12 Mo Total Return	38.0%	23.3%
Momentum Grade	A-	C
3 Yr Avg Tot Ret	38.3%	11.8%
5 Yr Avg Tot Ret	14.9%	-0.3%
10 Yr Avg Tot Ret	23.6%	5.1%
Performance Grade	A	C
2008 Total Return	-45.2%	-38.5%
Safety Grade	C	C

Best Stocks Now! Stocks Sectors Dow Search

AT&T 4G 1:23 PM

Search ois

Gunderson Stock Grade	
A-	
Ranking	
Current	72 / 2987
1 day ago	68
7 days ago	92
1 month ago	98
2 months ago	298
3 months ago	496

Best Stocks Now! Stocks Sectors Dow Search

Business Summary

Oil States International, Inc., through its subsidiaries, provides specialty products and services to the oil and gas drilling and production companies worldwide. It operates in four segments:

Accommodations, Offshore Products, Well Site Services, and Tubular Services. The Accommodations segment offers temporary and permanent work force accommodation services for people working in remote locations. The Offshore Products segment designs and manufactures flexible bearings and connector products; sub sea pipeline products; marine winches, mooring systems, and cranes and rig equipment; and conductor casing connections and pipes, as well as provides blowout preventer stack assembly, integration, testing, and repair services; and drilling riser and related repair services. The Well Site Services segment offers a range of products and services that are used to drill for, and establish and maintain the flow of oil and gas from a well throughout its lifecycle. This segment engages in the rental of wireline and coiled tubing pressure control equipment; wellhead isolation equipment; pipe recovery systems; thru-tubing fishing services; hydraulic chokes and manifolds; blow out preventers; well testing and flowback equipment; gravel pack operations on well bores; and surface control equipment and down-hole tools utilized by coiled tubing operators. This segment also provides land drilling services. The Tubular Services segment distributes a range of casing and tubing products; and offers threading, logistical, and inventory management services. The company serves national oil companies, independent oil and gas companies, onshore and offshore drilling companies, and other oilfield service and mining companies. Oil States International, Inc. was founded in 1995 and is based in Houston, Texas

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.



Bill Gunderson's

Best Stocks Now

Top 200 as of 9/14/2012

		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
	Admin Fondos	29	11	1	3	15	15	1	1
A+	AAPL Apple Computer	5	42	14	10	12	12	4	2
A	CRUS Cirrus Logic Inc	17	35	137	12	55	55	5	3
A	OCN Ocwen Financial Corp	753	676	768	310	4	4	8	4
A	PCYC Pharmacyclics Inc	3	1	2	24	1	1	2	5
A	REGN Regeneron Pharmaceuticals	18	142	49	138	132	132	6	6
A	ARIA Ariad Pharmaceuticals Inc	21	32	29	17	5	5	7	7
A	ENL Reed Elsevier Nv Adr	2258	1567	1114	484	203	203	3	8
A	BAH Booz Allen Hamilton	2682	2794	2793	682	1032	1032	14	9
A	MMS Maximus Inc	327	248	33	170	73	73	10	10
A	HHC Howard Hughes Corp.	1240	600	695	414	249	249	24	11
A	ALXN Alexion Pharmaceuticals	14	9	15	14	17	17	16	12
A	TSCO Tractor Supply Co	34	118	326	86	39	39	11	13
A	MDVN Medivation	11	13	7	9	104	104	12	14
A	TDG Transdigm Group Inc	20	12	21	82	20	20	27	15
A	IT Gartner Inc Cl A	93	62	36	29	23	23	42	16
A	HSTM Healthstream	42	147	34	28	43	43	18	17
A	ASPS Altisource	59	6	9	1	11	11	47	18
A	TWO Two Harbors	1169	179	198	447	584	584	13	19
A	CSOD Cornerstone Ondemand	305	301	352	52	109	109	38	20
A	ONXX Onyx Pharmaceuticals Inc	125	7	3	22	68	68	23	21
A	CALL Majicjack Vocal	896	952	857	43	19	19	39	22
A	ODFL Old Dominion Freight Lines	135	189	345	101	92	92	9	23
A	ULTI Ultimate Software	122	28	40	56	62	62	19	28
A	AZZ AZZ Inc	175	68	37	70	63	63	20	29
A	CBST Cubist Pharmaceuticals	286	267	170	41	27	27	28	30
A	AOS Smith AO Corp	111	79	101	57	69	69	34	31
A	EQIX Equinix Inc	49	49	69	27	18	18	26	32
A	BCOR Infospace Inc	0	423	222	205	22	22	31	33
A	TIBX Tibco Software Inc	332	237	370	322	211	211	22	34
A	AIRM Air Methods Corp	153	31	25	21	26	26	37	35
A	OSIS OSI Systems Inc	63	117	89	92	24	24	50	36
A	Z Zillow	183	0	706	1230	2125	2125	159	37
A	FL Foot Locker Inc	96	164	67	39	128	128	32	38
A	CQP Cheniere Energy Partners	907	115	26	132	290	290	78	39
A	CBD Companhia Brasileira Adr	830	300	340	221	85	85	36	40
A	CRI Carters Inc	40	89	133	199	151	151	44	41
A-	AIT Applied Industrial Tech	304	455	405	161	72	72	21	42
A-	UNP Union Pacific Corp	97	85	95	120	82	82	61	43
A-	HWKN Hawkins Inc	179	56	38	69	121	121	17	44
A-	HGR Hanger Orthopedic Grp	446	470	511	456	241	241	52	45
A-	KSU Kansas City Southern	384	154	213	162	31	31	53	46
A-	RMD Resmed Inc	271	429	460	196	48	48	43	47
A-	ISRL Isramco Inc	117	145	238	89	215	215	92	48
A-	VRX Valeant Pharmaceuticals Intl	321	472	318	72	106	106	59	49
A-	PNRA Panera Bread	114	207	207	93	112	112	40	50
A-	TRMB Trimble Navigation Ltd	154	222	654	394	113	113	29	51
A-	TPCG T P C Group Inc.	1237	1141	988		95	95	41	52
A-	LUFK Lufkin Ind Inc	1112	917	388	984	796	796	149	53

Bill Gunderson's

Best Stocks Now

Top 200 as of 9/14/2012

		Three	Two	Six	One	Two	One	Yest.	Current	
		Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Rank	Rank	
		Rank	Rank	Rank	Rank	Rank	Rank	Rank	Rank	
A-	NVO	Novo Nordisk A/S	152	52	71	34	54	54	33	54
A-	OXM	Oxford Ind Inc	208	549	552	210	96	96	46	55
A-	PVH	Phillips-Van Heusen Corp	221	386	382	626	114	114	89	56
A-	SGEN	Seattle Genetics Inc	58	24	11	110	28	28	51	57
A-	WES	Western Gas Partners	146	149	58	48	232	232	88	58
A-	FCFS	First Cash Financial Services	600	170	70	164	88	88	72	59
A-	CLR	Continental Res Inc.	537	320	183	262	202	202	60	60
A-	SDRL	Seadrill Ltd.	555	405	187	150	98	98	55	61
A-	MLNX	Mellanox Technologies	52	187	272	2	10	10	56	62
A-	SWI	Solarwinds Inc.	46	105	402	16	25	25	119	63
A-	GNC	G N C Holdings	28	26	52	247	552	552	66	64
A-	PIR	Pier 1 Imports Inc	296	368	409	265	100	100	58	65
A-	ANSS	Ansys Inc	107	274	689	291	223	223	85	66
A-	BBSI	Barrett Business Svcs	387	460	525	649	419	419	48	67
A-	TGA	Transglobe Energy Corp	822	903	811	158	75	75	76	68
A-	SXL	Sunoco Logistic Parnters	519	213	203	142	58	58	90	69
A-	AHGP	Alliance Holdings	682	198	202	54	60	60	118	70
A-	MWIV	M W I Veterinary Supply	76	41	65	469	179	179	49	71
A-	OIS	Oil States Intl	802	502	129	80	41	41	68	72
A-	PKO	Pimco Income Opp. Fund	365	132	53	71	542	542	113	73
A-	DXPE	DXP Enterprises Inc	83	123	159	66	66	66	124	74
A-	FLT	Fleetcor Technologies	316	439	299	245	122	122	54	75
A-	IPGP	IP G Photonics	0	0	0	38	34	34	57	77
A-	FMX	Fomento Econ Mex Sab Ads	112	73	57	123	258	258	106	78
A-	GWW	Grainger WW Inc	269	282	140	97	124	124	82	79
A-	BGS	B & G Foods	65	71	108	37	67	67	65	80
A-	JHX	James Hardee Industrial	671	122	51	49	156	156	121	81
A-	CYNO	Cynosure Inc.	411	80	112	134	164	164	74	83
A-	DORM	Dormans	193	94	88	47	8	8	86	84
A-	ECPG	Encore Capital	330	258	356	32	38	38	116	85
A-	PCLN	Priceline.com Inc	85	125	90	157	402	402	103	86
A-	GNRC	Generac Holdings Inc	335	23	13	65	160	160	151	87
A-	FRAN	Francesca's Hldgs. Corp.	2158	2232	0	1324	969	969	197	88
A-	AVD	American Vanguard Corp	27	51	83	113	37	37	67	89
A-	EBIX	Ebix Inc.	438	342	228	19	29	29	125	90
A-	MWE	Midstream Partners	919	217	214	183	452	452	238	91
A-	CIE	Cobalt Intl. Energy	594	313	225	888	1002	1002	62	93
A-	CMN	Cantel Medical	129	22	35	26	40	40	138	94
A-	HD	Home Depot Inc	162	226	260	181	52	52	45	95
A-	NEU	Newmarket Corp.	67	101	60	118	129	129	112	96
A-	TSM	Taiwan Semiconductor Inc	744	284	791	197	131	131	154	97
A-	FAST	Fastenal Co	370	276	96	50	188	188	155	98
A-	ROST	Ross Stores Inc	60	65	79	61	53	53	93	99
A-	IBB	Biotechnology Index iShares	0	0	0	0	204	204	94	100
A-	EPHC	Epoch Holding	113	139	397	279	437	437	175	101
A-	MIDD	Middleby Corp	121	220	205	214	59	59	150	102
A-	FBIOX	Fidelity Select Biotechnology	2781	2788	2672	2762	220	220	80	103
A-	BIPIX	Profunds Biotech Ultra	2431	2367	2206	126	81	81	81	104
A-	CTXS	Citrix Systems Inc	369	206	204	430	224	224	123	105
A-	JYG	iPath? DJ-AIG Grains Total Return Sub-Inde	0	27	6	13	266	266	205	106

Bill Gunderson's

Best Stocks Now

Top 200 as of 9/14/2012

		Three	Two	Six	One	Two	One		
		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>
A-	V	92	50	81	90	238	238	77	107
A-	PLL	870	722	649	288	300	300	71	108
A-	ALGN	90	57	126	130	177	177	148	109
A-	BIIB	55	72	102	84	107	107	83	110
A-	VPHM	679	810	528	444	71	71	109	111
A-	DX	157	54	82	180	152	152	110	112
A-	MMP	308	196	161	124	137	137	128	113
A-	EGHT	401	421	380	7	16	16	122	114
A-	WSO	119	87	41	319	269	269	114	115
A-	FFIV	930	699	604	213	91	91	288	116
A-	ACHN	1546	1735	1798	738	1268	1268	87	117
A-	UTEK	664	701	607	566	388	388	157	118
A-	ARII	1068	993	1064	641	330	330	70	119
A-	ASNA	514	537	424	446	324	324	64	120
A-	LNKD	407	280	573	1015	626	626	98	121
A-	SSYS	2353	2442	2456	25	9	9	196	122
A-	BJRI	437	804	288	266	524	524	131	123
A-	HMSY	126	4	5	15	3	3	96	124
A-	KTCC	677	165	622	703	178	178	97	125
A-	UNFI	548	475	812	933	567	567	107	126
A-	URBN	760	1009	297	370	247	247	104	127
A-	XBI	1101	91	93	448	444	444	73	128
A-	STWD	923	219	469	677	116	116	165	129
A-	VAL	192	136	107	460	193	193	173	131
A-	DUSA	1287	596	310	421	546	546	179	132
A-	RYOIX	2175	1572	1595	2379	239	239	99	133
A-	OII	378	233	150	77	47	47	129	134
A-	VFC	105	303	227	204	167	167	95	135
A-	BRLI	462	388	367	106	32	32	174	136
A-	SHS	1443	1614	1328	487	454	454	134	137
A-	NTGR	1765	728	958	404	80	80	186	138
A-	AME	136	130	211	231	127	127	101	139
A-	EL	190	281	394	254	118	118	75	140
A-	RHT	104	302	334	154	64	64	153	141
A-	DFZ	428	214	335	163	362	362	168	142
A-	SYNT	86	126	321	260	278	278	170	143
A-	WRLS	457	30	91	145	61	61	158	144
A-	POOL	265	97	392	431	234	234	181	145
A-	RAX	904	908	799	246	50	50	144	146
A-	ALNY	980	243	188	195	784	784	203	147
A-	ITB	0	0	0	0	0	0	184	148
A-	WYN	73	84	144	175	163	163	91	149
A-	GTLS	314	205	506	200	93	93	100	150
A-	IMGN	32	15	64	553	696	696	145	151
A-	WAB	216	112	190	129	139	139	130	152
A-	AYI	652	312	253	220	105	105	137	153
A-	FDS	197	766	508	224	395	395	204	154
A-	DISCA	95	133	386	242	165	165	185	155

Bill Gunderson's

Best Stocks Now

Top 200 as of 9/14/2012

			Three	Two	Six	One	Two	One		
			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>
A-	HAIN	Hain Celestial Grp	139	141	97	258	102	102	195	156
A-	PETM	Petsmart Inc	8	20	31	33	56	56	143	157
A-	GILD	Gilead Sciences Inc	331	286	325	301	86	86	126	158
A-	AE	Adams Res & Energy Inc.	1880	262	248	942	782	782	63	159
A-	PRHSX	T.Rowe Price Health Science	73	119	122	239	214	214	162	160
A-	CTRX	S X C Health Solutions	19	2	120	136	57	57	79	161
A-	NXST	Nexstar Broadcasting Grp	1782	2270	2515	151	210	210	164	162
A-	ELLI	Ellie Mae	62	33		4	6	6	120	163
A-	GGG	Graco Inc	460	1079	965	329	146	146	191	164
A-	LGF	Lions Gate Entertainment	198	169	267	308	228	228	139	165
A-	SHW	Sherwin-Williams Co	45	63	46	58	65	65	167	166
A-	WPI	Watson Pharmaceuticals	637	569	499	522	311	311	140	167
A-	AMZN	Amazon.com Inc	263	334	366	543	409	409	141	168
A-	IGTE	IGate Corp	132	316	702	478	183	183	169	169
A-	CAB	Cabelas	203	295	104	133	21	21	171	170
A-	WXS	Wright Express Corp	268	376	331	273	153	153	117	171
A-	BKE	Buckle Inc	668	547	406	338	226	226	187	172
A-	COO	Cooper Companies Inc	542	513	666	598	306	306	188	173
A-	TJX	TJX Co Inc	77	109	72	171	130	130	115	174
A-	CEF	Central Fund of Canada	751	1117	1402	989	265	265	176	175
A-	AFFY	Affymax Inc.	483	1040	245	230	375	375	202	176
A-	DBS	PowerShares DB Silver Fund	1318	1630	1521	1769	442	442	177	177
A-	JHI	John Hancock Investors Trust	158	129	56	149	326	326	237	178
A-	MA	Mastercard	159	108	173	341	272	272	111	179
A-	CNQR	Concur Technology	100	58	84	140	49	49	142	180
A-	RTK	Rentech, Inc	0	0	0	0	0	0	319	181
A-	CODI	Compass Diversified	963	524	561	282	271	271	133	182
A-	PCN	PIMCO Corporate Income Fund	433	168	59	53	120	120	211	183
A-	RGR	Sturm, Ruger & Co. Inc	535	369	158	81	110	110	223	184
A-	SF	Stifel Financial	1149	983	1043	950	334	334	189	185
A-	ESRX	Express Scripts Inc	236	236	145	91	70	70	234	186
A-	ABG	Asbury Automotive Group Inc	531	617	256	428	557	557	178	187
A-	ADS	Alliance Data Systems Corp	82	82	114	187	78	78	136	188
A-	BWLD	Buffalo Wild Wings Inc	178	144	223	787	1039	1039	127	189
A-	FOSL	Fossil Inc	878	1107	740	1125	111	111	434	190
A-	SWKS	Skyworks Solutions Inc	141	336	242	31	42	42	291	191
A-	USNA	USANA Health Sciences Inc	127	194	280	79	170	170	108	192
A-	FTK	Flotek Industries	0	0	0	0	0	0	198	193
A-	NOV	National Oilwell Varco Inc	770	786	683	119	181	181	166	194
A-	VRSN	Versign Inc	347	86	208	95	44	44	200	195
A-	TWC	Time Warner Cable Inc	436	204	264	83	90	90	135	196
A-	NATH	Nathan's Famous Inc	12	29	17	8	13	13	353	197
A-	FBDIX	Franklin Biotechnology Discovery	73	2382	100	193	218	218	201	199
A-	DDD	Three D Systems	2336	61	44	63	51	51	215	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				Suggested
401-K Allocation 9/14/12			<u>Rank</u>	<u>Allocation</u>
A-	FBIOX	Fidelity Select Biotechnology	103	15.0%
A-	BIPIX	Profunds Biotech Ultra	104	
A-	PRHSX	T.Rowe Price Health Science	160	15.0%
A-	FBDIX	Franklin Biotechnology Discovery	199	
A-	PETDX	PIMCO Real Est. Real Ret. Strat.	201	10.0%
B+	FSCRX	Fidelity Small Cap Discovery	236	15.0%
B+	UOPIX	Profunds Ultra NASDAQ	240	
B+	FBMPX	Fidelity Sel. Multimedia	334	10.0%
B+	FSHOX	Fidelity Select Construction & Housing	463	10.0%
B+	FHEAX	Fidelity Advisor Real Estate A	503	
B	FBTIX	Fidelity Advisor Biotechnology	635	
B	FADTX	Fidelity Advisor Technology A	651	15.0%
B	FMFAX	Fidelity Advisor Materials A	729	
B	DGVRX	Dreyfus Technology Gr. 1	730	
B	FMKAX	Fidelity Advisor Emerging Markets Inc A	896	
B	FSAGX	Fidelity Select Gold	925	10.0%
				<u>100.0%</u>

Just one change this week- I am moving the 10% position from Consumer Staples to gold. Continue to avoid bonds.

COMMODITIES (as of Sept. 14, 2012)

Time to buy again!

		<u>2012 YTD</u>
Grains	JJG	41.1%
Gasoline	UGA	26.3%
Silver	SLV	24.7%
Corn	CORN	20.3%
Gold	GLD	13.0%
Copper	JJC	10.1%
Steel	SLX	3.0%
Oil	USO	-3.3%
Livestock	COW	-6.3%
Cotton	BAL	-11.8%
Coal	KOL	-20.9%

INTERNATIONAL AND EMERGING MARKET WATCH: As of September 14, 2012

		<u>2012 ytd</u>
Thailand	THD	26.5%
Mexico	EWV	22.3%
Peru	EPV	21.3%
India	INP	20.7%
United States	^GSPC	16.6%
Russia	RSX	16.2%
Vietnam	VNM	15.8%
Europe	EFA	13.4%
Italy	EWI	11.7%
Canada	EWC	10.5%
Greece	GREK	8.6%
Emerging Mkts.	ADRE	6.4%
Japan	EWJ	3.8%
Chile	CH	1.5%
China	FXI	0.9%
Brazil	EWZ	-0.6%
Spain	EWP	-1.1%

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.

<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	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
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
35	30-Sep-11	DG	Dollar General	Consumer	\$37.76	121	\$4,569	\$48.90	\$5,917	29.5%	31-Aug-12
36	26-Aug-11	DLTR	Dollar Tree	Consumer	\$35.23	130	\$4,580	\$48.49	\$6,304	37.6%	31-Aug-12

16.9%

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	QSI	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	Geosources	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	NTES	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
43	CRUS	Cirrus Logic	Technology	22-Jun-12	\$29.47	166	\$4,892	\$26.40	\$4,382	-10.4%	6-Jul-12
44	OSIS	O S I Systems	Technology	9-Mar-12	\$60.97	79	\$4,817	\$62.06	\$4,903	1.8%	6-Jul-12
45	ALLT	Allot Communications	Technology	20-Apr-12	\$23.57	210	\$4,950	\$22.37	\$4,698	-5.1%	6-Jul-12
46	PCYC	Pharmacyclics	Drug	25-May-12	\$32.85	145	\$4,763	\$53.05	\$7,692	61.5%	6-Jul-12
47	QCOR	Questcor Pharm.	Drug	27-Apr-12	\$44.70	110	\$4,917	\$50.23	\$5,525	12.4%	6-Jul-12
48	VVUS	Vivus Inc.	Drug	18-May-12	\$22.40	205	\$4,592	\$24.15	\$4,951	7.8%	20-Jul-12
49	FXP	Inverse China 2:1	Inverse	22-Jun-12	\$29.88	163	\$4,870	\$27.99	\$4,562	-6.3%	20-Jul-12
50	AAPL	Apple Comp.	Technology	5-Mar-10	\$218.95	8	\$1,752	\$576.26	\$4,610	163.2%	27-Jul-12
51	NEOG	Neogen	Drug	29-Jun-12	\$47.02	106	\$4,984	\$43.11	\$4,570	-8.3%	27-Jul-12
52	SLXP	Salix Pharmaceuticals	Medical	23-Mar-12	\$52.60	78	\$4,103	\$44.88	\$3,501	-14.7%	31-Jul-12
53	AKRX	Akorn Inc.	Drug	1-Jun-12	\$13.36	348	\$4,649	\$12.68	\$4,413	-5.1%	10-Aug-12
54	BMRN	Biomarin Pharm.	Drug	13-Jul-12	\$43.30	111	\$4,806	\$37.53	\$4,166	-13.3%	10-Aug-12
55	INCY	Incyte Corp.	Drug	13-Jul-12	\$25.47	190	\$4,839	\$18.14	\$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	\$34.08	\$4,737	-1.7%	24-Aug-12
60	DLTR	Dollar Tree	Consumer	21-May-10	\$20.35	100	\$2,035	\$48.44	\$4,844	138.1%	27-Aug-12
61	HMSY	H M S Holdings	Healthcare	3-Aug-12	\$34.89	100	\$3,489	\$32.67	\$3,267	-6.4%	14-Sep-12

14.6%

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.Market's 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
18	5-Aug-11	WPC	W P Carey	REIT	\$35.80	\$34.41	140	\$5,012	\$43.39	\$6,075	26.1%	11-Sep-12

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