



BILL GUNDERSON'S BEST STOCKS NOW NEWSLETTER

Honest Counsel for Successful People.

April 5, 2013

Are the Winds of Change Beginning to Blow?

Asset Class	Fri. 3/29/13 Close	Fri. 4/5/13 Close	Week Change	Week Pct. Change
S&P500	1569.19	1553.28	-15.91	-1.01%
DJIA	14,578.54	14,464.94	-113.60	-0.78%
NASD	3267.52	3203.86	-63.66	-1.95%
S&P600 (Small)	531.38	517.47	-13.91	-2.62%
S&P400 (Mid-Cap)	1153.68	1123.94	-29.74	-2.58%
Total World Stock Index	52.28	51.69	-0.59	-1.13%
Emg. Mkts (VWO)	42.90	41.97	-0.93	-2.17%
Em Mkt Sm. Cap (DGS)	51.59	50.80	-0.79	-1.53%
Europe (EFA)	58.98	58.75	-0.23	-0.39%
China (FXI)	36.93	35.64	-1.29	-3.49%
Latin America (ILF)	43.65	42.94	-0.71	-1.63%
U.S. 10yr. Tr.	1.85%	1.69%	-0.16%	8.65%
Greece 10yr. Bond	12.49%	12.02%	-0.47%	3.76%
Italy 10yr. Bond	4.76%	4.57%	-0.19%	3.99%
Spain 10yr. Bond	5.07%	4.91%	-0.16%	3.16%
Oil	97.23	93.04	-4.19	-4.31%
Gold	1596.00	1580.20	-15.80	-0.99%

While the damage in the market does not look all that bad, it was really worse than it looked. Several leadership groups in the market took on some water this past week, while the bond market was the big winner. This is never a good sign. The question is: what should investors do now?

Let's start off by looking at the current ranking of the asset classes:

Top 8 Last Week

Rank	Asset Class	Grade
1	MLP Index JP Morgan/AI... (AMJ-248)	A-
2	Smallcap Dividend Index (DES-634)	B+
3	Small-Cap Value Index (IJS-707)	B+
4	Small-Cap Growth Index (IJT-708)	B+
5	Mid Cap Growth (IJK-765)	B+
6	Mortgage REIT Index (REM-810)	B+
7	Small-Cap Vanguard Index (VB-826)	B+
8	Largecap Dividend Index (DLN-965)	B+

Top 8 This Week

Rank	Asset Class	Grade
1	MLP Index JP Morgan/AI... (AMJ-531)	B+
2	Smallcap Dividend Index (DES-802)	B
3	U.S. Treas. 20+ Index (TLT-845)	B
4	Largecap Dividend Index (DLN-877)	B
5	Mortgage REIT Index (REM-902)	B
6	Small-Cap Value Index (IJS-1004)	B
7	Mid Cap Growth (IJK-1121)	B
8	Small-Cap Growth Index (IJT-1122)	B

#9-16 this week.

Rank	Asset Class	Grade
9	REIT Index US Spider (RWR-1218)	B
10	S P 500 Spider (SPY-1280)	B
11	Inflation Protected Treas (TIP-1317)	B
12	U.S. Treasury 5-10yr Index (BIV-1321)	B
13	Large Cap Value Index (JKF-1323)	B
14	Nasdaq 100 Index (QQQ-1466)	B-
15	High Yield Index (HYG-1469)	B-
16	U.S. Pref. Stock Index (PFF-1561)	B-

As you can see, no change in the number one and two spots this week, but they both dropped one-half grade. I like asset classes that are ranked B+ or better. The universe really got a lot smaller this past week.

While I like B+ or better, I do not automatically sell the entire asset class when it drops to B. It could just be a short-lived move. After all, we did have a threat of nuclear war this past week and our first poor jobs reports in quite some time. These are both events that could blow over quickly.

I think that is too early to do anything rash. We need to dig into this thing a little bit further before we do that.

The biggest change that I see this week so far is the sudden emergence of U. S. Treasuries in the number three spot. You know how bearish I am on the bond market. Where did these low interest rates (1.69%) come from all of a sudden? Again, North Korea and a spate of poor jobs reports were a homebuyers' best friend this past week.

Home and bond buyers love bad news, which usually causes equity buyers to run and hide. Unfortunately, that was exactly what happened this past week.

Also notice the drop in rank of the two go-go asset classes that have been leading this market, mid-cap growth and small-cap growth. They are still in the elite eight, however. I still see no reason to really freak out yet. While sell-offs in the market are no fun, they are also inevitable.

The question is this: Do we panic and sell? Or do we fasten our seatbelts and hang tough [stay with] with the one that brought us to the dance?

We still need more evidence before we panic. Let's next look at this week's worst asset classes. Maybe they are starting to rise in rank. That would be the first ominous sign of real change:

Bottom 8 Ranked Last Week

Grade	Asset Class	Symbol
	SLV	(2357)
C+	Calif. Muni Bond Index	CMF-(2402)
C+	Emg.Mkts.Small-Cap Ind...	EWX-(2443)
C+	Emerging Mkt Index	ADRE-(2699)
C	Gold denominated in U.S.	GTU-(2745)
C	Commodity Index	DBC-(2762)
C	Short Term Bond Index	BSV-(2910)
C	Goldminer's Index	GDX-(2980)
D	S P 500 Inverse	SH-(3271)

Bottom 8 Ranked This Week

Grade	Asset Class	Symbol
	DEW	(2365)
C	Silver	SLV-(2661)
C	Commodity Index	DBC-(2717)
C	Emerging Mkt Index	ADRE-(2764)
C	Short Term Bond Index	BSV-(2800)
C-	Gold denominated in U.S.	GTU-(2954)
C-	Emg.Mkts.Small-Cap Ind...	EWX-(2997)
C-	Goldminer's Index	GDX-(3073)
D	S P 500 Inverse	SH-(3265)

If I am a bear, I would not be too encouraged by the S&P inverse fund barely budging this past week. Although the bears had a few cheap thrills, being short the market is still the worst place to be. The bears eventually will be right, but I need a lot more evidence to join them.

Gold loves bad news, and though it finally got some, it barely budged. Gold continues to be a cellar dweller. Once again, the evidence from gold fails to persuade this jury.

Cash (the short term bond index) moved up in rank by two notches, but I am not ready to cash in just yet. I need a lot more evidence than a few subtle moves amongst the asset classes. I need a lot more than just one week of bad news.

I am not saying that this is not the beginning of the end. After all this is the 49th month of a bull market and bull markets do not last forever.

Yes, I am getting nervous, but there have been a lot of nerve wracking events during this four year journey. In the overall scale of things, I don't think that this current crisis is the worst of the lot.

Let's next look at this week's sector rankings. There just has to be some shakeup at the top.

Top 8 Last Week

Rank	Grade	Sector Name	Ticker
1	A-	Vanguard Hlthcre ETF	VHT-(177)
2	A-	Biotech Index	IBB-(185)
3	A-	Homebuilder Sector	XHB-(251)
4	A-	Bldg. Const. (Powershar	PKB-(385)
5	A-	U.S.Hlthcr Index Dow Jone	IYH-(406)
6	A-	Pharmaceuticals Sector	XPH-(437)
7	B+	Retail Sector	XRT-(504)
8	B+	Global Consumer Index	IYC-(520)

Top 8 This Week

Rank	Grade	Sector Name	Ticker
1	A-	Vanguard Hlthcre ETF	VHT-(139)
2	A-	Biotech Index	IBB-(170)
3	A-	U.S.Hlthcr Index Dow Jone	IYH-(281)
4	B+	Global Health Care Index	IXJ-(362)
5	B+	Consumer Staples Sector	XLP-(399)
6	B+	Global Consumer Index	IYC-(432)
7	B+	Pharmaceuticals Sector	XPH-(503)
8	B+	Retail Sector	XRT-(533)

#9-16 This Week.

Rank	Grade	Sector Name	Ticker
9	B+	Consumer Discretionary...	XLY-(551)
10	B+	Hlthcre Providers Sector	IHF-(560)
11	B+	Utility Index	XLU-(608)
12	B+	U.S. Consumer Goods In...	IYK-(627)
13	B+	Intl. REIT Index	VNQ-(645)
14	B+	Insurance Index	KIE-(687)
15	B	Bldg. Const. (Powershar	PKB-(725)
16	B	Homebuilder Sector	XHB-(901)

I see no change amongst the top two sectors. Healthcare and Biotech are not only the leading sectors, but they have gotten stronger since last week. It seems that investors are really crowding into these two sectors, which tend to be defensive in nature.

The obvious shakeup this week comes in the homebuilding and construction sector.

While I don't believe for a minute that the rebound in housing is over (look at those interest rates), this red-hot sector was long overdue for a bout of profit-taking.

As you will see in a moment, I did lower my exposure to this area of the market for now, but I believe strongly that it will resume a leadership role at some point in the future.

Another defensive sector, consumer staples, also rose in rank by several notches. With the U. S. beefing up its nuclear defense shield in Guam, it is not unusual to see the market also get a bit more defensive.

The question is this: is North Korea bluffing once again?

Their track record would lean heavily in this direction, but you really can't discount threats of nuclear war.

The poor jobs reports could be a "one and done," or we could be slipping back into a no-growth mode, or even worse, another recession. I do believe that this is a real threat and needs to be watched carefully.

Let's see if there was any change amongst the worst sectors in the market:

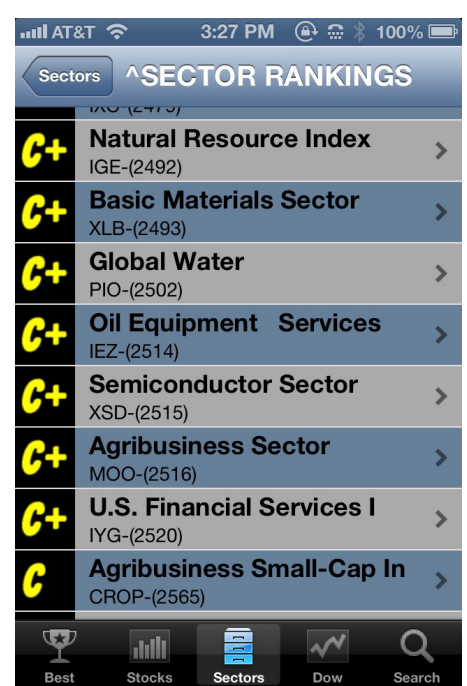
Bottom 8 Last Week



Bottom 8 This Week



Bottom 9-16 this week



The only noticeable change that I see is the moving up in rank of the Food and Beverage sector, yet another defensive move that is not unusual.

I think that we can step back and take a deep breath of fresh air. But, before we do that let's have a look at a chart of the overall market:



I still see a market that is above its 20 day, 50 day, and 200 day moving averages. Those are not exactly the signs that would point to pending bear market, but I am not going to let down my guard. There were enough changes this week to at least cause me to make several changes to my portfolios.

Here is where we stand year-to-date:

Asset Class	12/31/12 Close	Fri. 4/5/13 Close	2012 Final	2013 YTD
S&P500	1426.19	1553.28	13.41%	8.91%
DJIA	13104.00	14464.94	7.06%	10.39%
NASD	3019.51	3203.86	15.66%	6.11%
S&P600 (Small)	476.57	517.47	14.82%	8.58%
S&P400 (Mid-Cap)	1020.43	1123.94	16.07%	10.14%
Total World Stock Index	49.42	51.69	16.07%	4.59%
Emg. Mkts (VWO)	44.53	41.97	16.54%	-5.75%
Em Mkt Sm. Cap (DGS)	49.44	50.80	19.59%	2.75%
Eurupe (EFA)	56.86	58.75	14.80%	3.32%
China (FXI)	40.45	35.64	16.00%	-11.89%
Latin America (ILF)	43.84	42.94	2.98%	-2.05%
U.S. 10yr. Tr.	1.85%	1.69%	-0.53%	8.65%
Spain 10yr. Bond	5.07%	4.91%	5.17%	3.16%
Oil	97.23	93.04	5.21%	-4.31%
Gold	1596.00	1580.20	6.14%	-0.99%

The returns of the tech-heavy NASDAQ continue to disappoint as Apple (AAPL) is still dead money. The submergence of the emerging markets is a sign that the global economy is not exactly healthy. China is now down 11.9% year-to-date! That was sure a short-lived move that it made late last year!

The U.S. bond market is now positive for the year, but that may also be a short-lived move- - stay tuned!

This judge and jury does not see enough evidence yet to convict this current Bull. I still see no reason to **not** keep the green flag flying for now. But, I continue to check my rear-view mirror several times per day!



Please follow me on Twitter @BillGunderson, 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>

Bill Gunderson's Model Portfolio for Investors seeking Aggressive/Moderate Growth.

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 up

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

I have chosen Neogen (NEOG) as my featured stock of the week. I like stocks that have performance, value, and a healthy stock chart. Neogen currently has all three.

Neogen Corp	
Sector	Medical
Market Cap	1,180,000,000
Size	Small-Cap
Risk Profile	Aggressive
Valuation 04/05/13	
Last Closing Price	\$49.40
Next Yr EPS Est	\$1.32
Forward PE Ratio	37.42
Est 5 Yr Annual Gr	18.50%
PEG Ratio	2.02
5 Yr Target Price	\$98.00
Dividend Yield	0.00%
5 Yr Tot Ret Pot	98.4%

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Dividend Yield	0.00%
5 Yr Tot Ret Pot	98.4%
Gunderson Value Grade	
A	



Bill Gunderson's INCOME/GROWTH Model Portfolio

This portfolio is 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. This portfolio currently has an average yield of **6.2%**.

This portfolio is now up **8.58%** YTD and **16.31%** since its August 5, 2011 inception. This works out to an annualized rate of **9.77%**. Not bad for a CD alternative.

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

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

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

401-K Section (How is your 401k) portfolio doing?

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.

If you have a wide selection of mutual funds in your plan, here is my current basic recommendation:

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

401(k) Section (VERY BASIC)

Many folks have a very limited selection of choices in your 401-k. THIS NEW SECTION IS FOR YOU!

U.S. Large Cap 10.0%

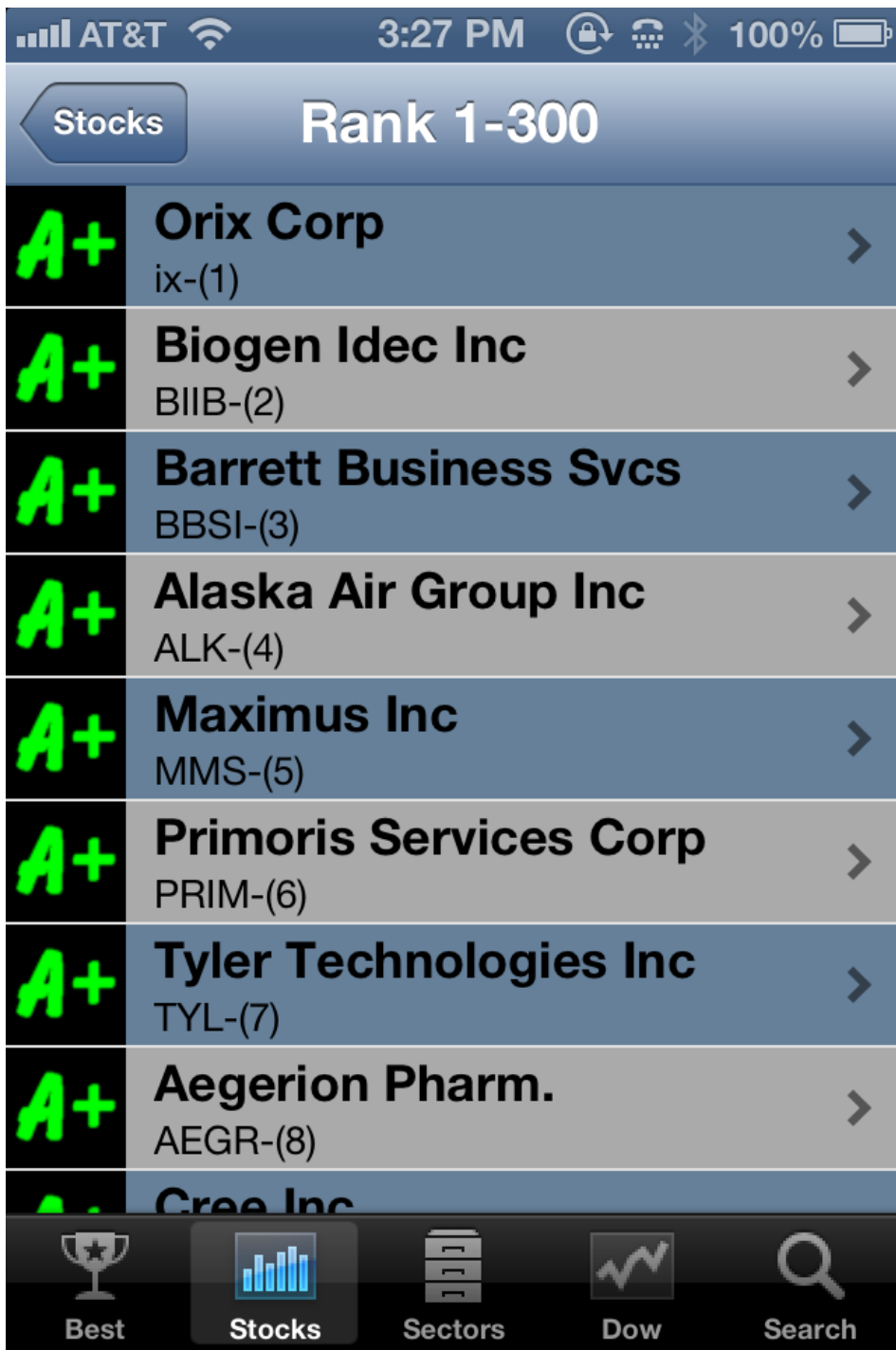
THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

Bill Gunderson's ETF Model Portfolio

This portfolio is for investors seeking growth. This portfolio is now up

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

BILL GUNDERSON WEEKLY TOP 300 LIST:



This is just an appetizer, here is the full list.

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY, BUT HERE ARE 200-300

Bill Gunderson's

Best Stocks Now

Top 300 as of 4/5/2013

	One	Six	Three	Two	Six	One	Two	One	Yest.	Current	
	Year Ago	Mos. Ago	Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Rank	Rank	
	Rank	Rank	Rank	Rank	Rank	Rank	Rank	Rank	Rank	Rank	
A- VFC VF Corp		80	62	682	686	714	432	264	408	293	200
A- WRLD World Acceptance Corp		656	731	685	468	703	541	712	529	207	201
A- AWH Allied World Assurance		1615	980	1231	817	219	228	239	346	216	202
A- FLO Flowers Foods Inc		1113	1478	213	305	135	147	192	309	218	203
A- KKD Krispy Kreme Doughnuts Inc		1392	1294	207	91	160	165	270	106	116	204
A- OCN Ocwen Financial Corp		615	4	183	37	70	46	82	257	183	205
A- ASGN On Assignment		1034	12	281	28	176	174	33	67	109	206
A- BONT Bon Ton Stores Inc		2519	1925	645	1120	799	1434	294	311	269	207
A- AOS Smith AO Corp		185	90	119	4	13	34	56	40	195	209
A- ENB Enbridge		205	227	344	343	496	256	408	128	169	210
A- GY Gencorp Inc		1511	1465	1984	791	611	355	340	350	243	212
A- CRAY Cray Inc		1355	840	141	337	459	97	205	230	230	213
A- JOBS Fifty One Job Inc.		259	256	175	203	707	348	368	302	201	214
A- ORLY O'Reilly Automotive Inc		39	480	285	212	24	24	73	178	192	215
A- UPW ProShares Ultra Utilities		1528	1438	2181	1359	767	822	448	496	273	216
A- SSYS Stratasys Inc.		2483	272	123	47	348	732	390	355	274	217
A- KERX Keryx Biopharmaceuticals		1735	1416	3074	522	728	880	286	338	319	218
A- MLNX Mellanox Technologies		179	11	831	804	405	1034	608	809	220	219
A- DEST Destination Maternity		1036	161	421	397	227	813	283	240	212	220
A- ACTS Action Semiconductor		2575	2873	2352	986	761	718	447	376	236	221
A- AFSI Amtrust Fin. Svcs.		171	529	35	158	71	237	79	88	164	222
A- PCYC Pharmacyclics Inc		51	31	106	8	5	3	7	303	214	223
A- VRTX Vertex Pharmaceuticals		1142	709	665	759	739	587	247	207	239	224
A- HEES	0	0	0	0	0	0	0	0	0	386	225
A- OII Oceaneering Intl Inc		70	580	274	39	84	154	114	107	204	226
A- ABT Abbot Laboratories		1321	342	262	196	446	746	1071	1013	228	227
A- HNP Huaneng Pwr International Inc		1674	2205	134	63	88	138	262	61	107	228
A- PII Polaris Industries Inc		12	67	190	144	351	210	71	93	175	229
A- BEAV BE Aerospace Inc		297	310	435	628	409	648	404	131	225	230
A- ADS Alliance Data Systems Corp		138	160	40	118	224	133	202	235	203	231
A- ARMH A R M Holdings		1467	404	203	211	14	63	172	331	284	232
A- FEIC FEI Co		955	674	82	195	26	71	257	177	205	233
A- ODFL Old Dominion Freight Lines		28	109	10	157	347	365	166	195	242	234
A- CEB Corp. Exec. Board		514	583	915	566	218	294	296	432	208	235
A- HTD John Hancock Tax Advantage Dividend Inco		390	224	750	683	308	530	369	314	255	237
A- EFC Eillington Financial		0	0	0	0	0	0	0	0	258	238
A- FXH Strataquant Healthcare Index		0	0	0	0	0	0	0	0	222	239
A- MA Mastercard		153	80	104	262	289	343	429	501	200	240
A- FTI F M C Technologies Inc		385	1022	1566	754	825	134	401	256	233	241
A- UGP Ultrapar Participacoes Adr		17	344	459	228	315	115	141	390	261	242
A- MDVN Medivation		80	17	339	68	366	1184	1452	1378	373	243
A- GMT GATX Corp		1033	465	399	261	205	187	187	244	223	244
A- MTZ Mastec Inc		1635	545	289	3	8	5	54	140	249	245
A- DFS Discover Financial Services		1026	800	966	1054	525	526	381	111	238	246
A- ABG Asbury Automotive Group Inc		422	158	107	89	45	295	69	116	194	247
A- CBI Chicago Bridge & Iron Co		292	1127	601	681	178	306	375	268	260	248
A- COO Cooper Companies Inc		384	57	477	357	108	255	235	182	173	249
A- GEL Genesis Energy Lp		306	670	220	227	180	79	163	194	278	250
A- KR Kroger Co		1817	1729	1316	1020	713	554	667	608	291	251

Bill Gunderson's

Best Stocks Now

Top 300 as of 4/5/2013

			One	Six	Three	Two	Six	One	Two	One	Yest.	Current	
			Year Ago	Mos. Ago	Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Rank	Rank	
			<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>	<u>Rank</u>	
A-	GEL	Genesis Energy Lp		306	670	220	227	180	79	163	194	278	250
A-	KR	Kroger Co		1817	1729	1316	1020	713	554	667	608	291	251
A-	ALEX	Alexander & Baldwin		1274	664	378	823	441	437	525	510	280	252
A-	FLT	Fleetcor Technologies		229	44	452	568	54	217	433	545	254	253
A-	SNI	Scripps Network		860	1297	890	571	552	288	317	447	370	254
A-	CNK	Cinemark Holdings		304	909	445	614	527	763	727	209	282	255
A-	CI	CIGNA Corp		1834	1056	1436	1546	781	1078	917	881	240	256
A-	IPAR	Inter Parfums Inc		959	881	572	398	130	135	413	323	285	257
A-	IEX	IDEX Corp		472	615	135	209	319	267	129	147	210	258
A-	KUB	Kubota Corp ADR		1233	1269	93	513	746	373	409	354	314	259
A-	MHK	Mohawk Ind Inc		1437	1390	76	175	83	181	253	286	300	260
A-	ISSC	Innovative Sltn & Support		2541	2608	1689	1027	1016	757	1133	1260	580	261
A-	ITIC	Investors Title Co		783	91	816	539	928	540	479	804	295	262
A-	LKQ	LKQ Corp		338	165	270	215	126	1182	962	1149	296	263
A-	AMSF	Amerisafe		1876	987	1501	1774	656	316	199	162	227	264
B+	IMGN	Immunogen Inc		63	393	305	237	795	202	151	196	537	265
B+	BX	Blackstone Group		1846	1763	886	135	222	238	364	201	259	266
B+	TJX	TJX Co Inc		71	198	560	269	458	595	640	389	268	267
B+	NWSA	News Corp		993	1275	1432	946	1145	177	246	279	271	268
B+	PDFS	PDF Solutions Inc		920	525	1613	1009	801	118	427	304	486	269
B+	BSFT	Broadsoft		1125	2287	1870	2748	951	2436	2704	1687	1341	270
B+	STWD	Starwood Property Trust		161	552	313	249	370	153	212	197	346	271
B+	ACMP	Access Midstream Ptnrs		1717	2219	532	451	240	287	338	370	257	272
B+	RRTS	Roadrunner Trans. System		0		2838	1901	1906	83	185	267	221	273
B+	UA	Under Armour		190	184	668	490	1015	961	492	473	302	274
B+	AHGP	Alliance Holdings		908	125	548	1057	269	274	605	589	430	275
B+	RUTH	Ruths Hospitality Group		1259	1419	709	1124	1361	198	288	419	313	276
B+	CSV	Carriage Services Inc		1474	1186	508	637	495	450	442	406	290	277
B+	NEU	Newmarket Corp.		287	154	200	344	562	444	402	296	305	278
B+	URI	United Rentals Inc		374	1008	81	27	137	201	512	90	306	279
B+	PKOH	Park Ohio Holding Corp		1378	883	1110	1269	1188	2262	711	471	338	280
B+	PNRA	Panera Bread		45	30	216	419	688	626	596	404	298	281
B+	SBGI	Sinclair Broadcast Group		2217	635	683	860	802	99	327	377	308	282
B+	UGE	Consumer Goods Index 2X		621	501	493	202	231	303	232	282	231	283
B+	CRI	Carters Inc		882	292	204	25	64	846	567	604	312	284
B+	ADC	Agree Realty		1112	196	963	774	542	503	451	997	320	285
B+	AMT	American Tower Corp		226	153	31	421	634	317	634	396	323	286
B+	CACC	Credit Acceptance Corp.		265	217	348	1087	268	230	255	164	189	287
B+	HCSG	Healthcare Services Grp Inc		59	338	350	458	452	597	357	301	262	288
B+	IMAX	Imax Corp		175	83	283	594	330	184	335	440	384	289
B+	NTESS	Netease.Com Inc ADR		22	152	808	443	281	362	513	484	301	290
B+	MPC	Marathon Petroleum		988	877	1398	1409	1773	1189			315	291
B+	AMP	Ameriprise Financial Inc		1858	1931	210	162	170	260	161	160	288	292
B+	VTR	Ventas Inc.		254	744	896	934	859	433	679	757	352	293
B+	ROP	Roper Industries Inc		244	155	538	557	695	31	154	297	297	294
B+	CBST	Cubist Pharmaceuticals		164	52	233	270	677	495	256	322	270	295
B+	EQIX	Equinix Inc		60	46	239	178	121	111	346	278	321	296
B+	HSTM	Healthstream		135	59	807	643	436	955	954	819	322	297
B+	CCE	Coca Cola Enterprises		478	771	906	829	312	296	333	308	277	299
B+	CLB	Core Laboratories NV		29	806	357	197	73	171	240	202	324	300

Bill Gunderson's Top 300 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.

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.



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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!

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



I did not write any articles this past week for *MarketWatch*, *TheStreet.com*, or *Seeking Alpha*. You can see my recent articles for the *TheStreet* by clicking [here](#)

To see my recent articles for *MarketWatch* click [here](#)

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:

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BILL GUNDERSON'S BEST STOCKS NOW NEWSLETTER

Honest Counsel for Successful People.

April 5, 2013

Are the Winds of Change Beginning to Blow?

Asset Class	Fri. 3/29/13 Close	Fri. 4/5/13 Close	Week Change	Week Pct. Change
S&P500	1569.19	1553.28	-15.91	-1.01%
DJIA	14,578.54	14,464.94	-113.60	-0.78%
NASD	3267.52	3203.86	-63.66	-1.95%
S&P600 (Small)	531.38	517.47	-13.91	-2.62%
S&P400 (Mid-Cap)	1153.68	1123.94	-29.74	-2.58%
Total World Stock Index	52.28	51.69	-0.59	-1.13%
Emg. Mkts (VWO)	42.90	41.97	-0.93	-2.17%
Em Mkt Sm. Cap (DGS)	51.59	50.80	-0.79	-1.53%
Europe (EFA)	58.98	58.75	-0.23	-0.39%
China (FXI)	36.93	35.64	-1.29	-3.49%
Latin America (ILF)	43.65	42.94	-0.71	-1.63%
U.S. 10yr. Tr.	1.85%	1.69%	-0.16%	8.65%
Greece 10yr. Bond	12.49%	12.02%	-0.47%	3.76%
Italy 10yr. Bond	4.76%	4.57%	-0.19%	3.99%
Spain 10yr. Bond	5.07%	4.91%	-0.16%	3.16%
Oil	97.23	93.04	-4.19	-4.31%
Gold	1596.00	1580.20	-15.80	-0.99%

While the damage in the market does not look all that bad, it was really worse than it looked. Several leadership groups in the market took on some water this past week, while the bond market was the big winner. This is never a good sign. The question is: what should investors do now?

Let's start off by looking at the current ranking of the asset classes:

Top 8 Last Week

Grade	Asset Class	Ticker
A-	MLP Index JP Morgan/AI...	AMJ-(248)
B+	Smallcap Dividend Index (DES-(634)
B+	Small-Cap Value Index	IJS-(707)
B+	Small-Cap Growth Index	IJT-(708)
B+	Mid Cap Growth	IJK-(765)
B+	Mortgage REIT Index	REM-(810)
B+	Small-Cap Vanguard Index	VB-(826)
B+	Largecap Dividend Index (DLN-(965)
B	Micro-Cap Index	

Top 8 This Week

Grade	Asset Class	Ticker
B+	MLP Index JP Morgan/AI...	AMJ-(531)
B	Smallcap Dividend Index (DES-(802)
B	U.S. Treas. 20+ Index	TLT-(845)
B	Largecap Dividend Index (DLN-(877)
B	Mortgage REIT Index	REM-(902)
B	Small-Cap Value Index	IJS-(1004)
B	Mid Cap Growth	IJK-(1121)
B	Small-Cap Growth Index	IJT-(1122)
B	REIT Index US Spider	

#9-16 this week.

Grade	Asset Class	Ticker
B	REIT Index US Spider	RWR-(1218)
B	S P 500 Spider	SPY-(1280)
B	Inflation Protected Treas	TIP-(1317)
B	U.S. Treasury 5-10yr Index	BIV-(1321)
B	Large Cap Value Index	JKF-(1323)
B-	Nasdaq 100 Index	QQQ-(1466)
B-	High Yield Index	HYG-(1469)
B-	U.S. Pref. Stock Index	PFF-(1561)
B-	Large-Cap Growth	

As you can see, no change in the number one and two spots this week, but they both dropped one-half grade. I like asset classes that are ranked B+ or better. The universe really got a lot smaller this past week.

While I like B+ or better, I do not automatically sell the entire asset class when it drops to B. It could just be a short-lived move. After all, we did have a threat of nuclear war this past week and our first poor jobs reports in quite some time. These are both events that could blow over quickly.

I think that is too early to do anything rash. We need to dig into this thing a little bit further before we do that.

The biggest change that I see this week so far is the sudden emergence of U. S. Treasuries in the number three spot. You know how bearish I am on the bond market. Where did these low interest rates (1.69%) come from all of a sudden? Again, North Korea and a spate of poor jobs reports were a homebuyers' best friend this past week.

Home and bond buyers love bad news, which usually causes equity buyers to run and hide. Unfortunately, that was exactly what happened this past week.

Also notice the drop in rank of the two go-go asset classes that have been leading this market, mid-cap growth and small-cap growth. They are still in the elite eight, however. I still see no reason to really freak out yet. While sell-offs in the market are no fun, they are also inevitable.

The question is this: Do we panic and sell? Or do we fasten our seatbelts and hang tough [stay with] with the one that brought us to the dance?

We still need more evidence before we panic. Let's next look at this week's worst asset classes. Maybe they are starting to rise in rank. That would be the first ominous sign of real change:

Bottom 8 Ranked Last Week

Grade	Asset Class	Symbol
	SLV	(2357)
C+	Calif. Muni Bond Index	CMF-(2402)
C+	Emg.Mkts.Small-Cap Ind...	EWX-(2443)
C+	Emerging Mkt Index	ADRE-(2699)
C	Gold denominated in U.S.	GTU-(2745)
C	Commodity Index	DBC-(2762)
C	Short Term Bond Index	BSV-(2910)
C	Goldminer's Index	GDX-(2980)
D	S P 500 Inverse	SH-(3271)

Bottom 8 Ranked This Week

Grade	Asset Class	Symbol
	DEW	(2365)
C	Silver	SLV-(2661)
C	Commodity Index	DBC-(2717)
C	Emerging Mkt Index	ADRE-(2764)
C	Short Term Bond Index	BSV-(2800)
C-	Gold denominated in U.S.	GTU-(2954)
C-	Emg.Mkts.Small-Cap Ind...	EWX-(2997)
C-	Goldminer's Index	GDX-(3073)
D	S P 500 Inverse	SH-(3265)

If I am a bear, I would not be too encouraged by the S&P inverse fund barely budging this past week. Although the bears had a few cheap thrills, being short the market is still the worst place to be. The bears eventually will be right, but I need a lot more evidence to join them.

Gold loves bad news, and though it finally got some, it barely budged. Gold continues to be a cellar dweller. Once again, the evidence from gold fails to persuade this jury.

Cash (the short term bond index) moved up in rank by two notches, but I am not ready to cash in just yet. I need a lot more evidence than a few subtle moves amongst the asset classes. I need a lot more than just one week of bad news.

I am not saying that this is not the beginning of the end. After all this is the 49th month of a bull market and bull markets do not last forever.

Yes, I am getting nervous, but there have been a lot of nerve wracking events during this four year journey. In the overall scale of things, I don't think that this current crisis is the worst of the lot.

Let's next look at this week's sector rankings. There just has to be some shakeup at the top.

Top 8 Last Week

Rank	Sector	Ticker
A-	Vanguard Hlthcre ETF	VHT-(177)
A-	Biotech Index	IBB-(185)
A-	Homebuilder Sector	XHB-(251)
A-	Bldg. Const. (Powershar	PKB-(385)
A-	U.S.Hlthcr Index Dow Jone	IYH-(406)
A-	Pharmaceuticals Sector	XPB-(437)
B+	Retail Sector	XRT-(504)
B+	Global Consumer Index	IYC-(520)

Top 8 This Week

Rank	Sector	Ticker
A-	Vanguard Hlthcre ETF	VHT-(139)
A-	Biotech Index	IBB-(170)
A-	U.S.Hlthcr Index Dow Jone	IYH-(281)
B+	Global Health Care Index	IXJ-(362)
B+	Consumer Staples Sector	XLP-(399)
B+	Global Consumer Index	IYC-(432)
B+	Pharmaceuticals Sector	XPB-(503)
B+	Retail Sector	XRT-(533)

#9-16 This Week.

Rank	Sector	Ticker
B+	Consumer Discretionary...	XLY-(551)
B+	Hlthcre Providers Sector	IHF-(560)
B+	Utility Index	XLU-(608)
B+	U.S. Consumer Goods In...	IYK-(627)
B+	Intl. REIT Index	VNQ-(645)
B+	Insurance Index	KIE-(687)
B	Bldg. Const. (Powershar	PKB-(725)
B	Homebuilder Sector	XHB-(901)

I see no change amongst the top two sectors. Healthcare and Biotech are not only the leading sectors, but they have gotten stronger since last week. It seems that investors are really crowding into these two sectors, which tend to be defensive in nature.

The obvious shakeup this week comes in the homebuilding and construction sector.

While I don't believe for a minute that the rebound in housing is over (look at those interest rates), this red-hot sector was long overdue for a bout of profit-taking.

As you will see in a moment, I did lower my exposure to this area of the market for now, but I believe strongly that it will resume a leadership role at some point in the future.

Another defensive sector, consumer staples, also rose in rank by several notches. With the U. S. beefing up its nuclear defense shield in Guam, it is not unusual to see the market also get a bit more defensive.

The question is this: is North Korea bluffing once again?

Their track record would lean heavily in this direction, but you really can't discount threats of nuclear war.

The poor jobs reports could be a "one and done," or we could be slipping back into a no-growth mode, or even worse, another recession. I do believe that this is a real threat and needs to be watched carefully.

Let's see if there was any change amongst the worst sectors in the market:

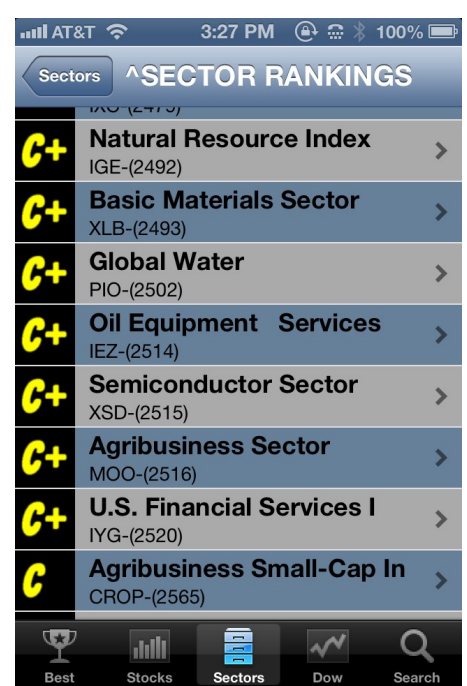
Bottom 8 Last Week



Bottom 8 This Week



Bottom 9-16 this week



The only noticeable change that I see is the moving up in rank of the Food and Beverage sector, yet another defensive move that is not unusual.

I think that we can step back and take a deep breath of fresh air. But, before we do that let's have a look at a chart of the overall market:



I still see a market that is above its 20 day, 50 day, and 200 day moving averages. Those are not exactly the signs that would point to pending bear market, but I am not going to let down my guard. There were enough changes this week to at least cause me to make several changes to my portfolios.

Here is where we stand year-to-date:

Asset Class	12/31/12 Close	Fri. 4/5/13 Close	2012 Final	2013 YTD
S&P500	1426.19	1553.28	13.41%	8.91%
DJIA	13104.00	14464.94	7.06%	10.39%
NASD	3019.51	3203.86	15.66%	6.11%
S&P600 (Small)	476.57	517.47	14.82%	8.58%
S&P400 (Mid-Cap)	1020.43	1123.94	16.07%	10.14%
Total World Stock Index	49.42	51.69	16.07%	4.59%
Emg. Mkts (VWO)	44.53	41.97	16.54%	-5.75%
Em Mkt Sm. Cap (DGS)	49.44	50.80	19.59%	2.75%
Eurupe (EFA)	56.86	58.75	14.80%	3.32%
China (FXI)	40.45	35.64	16.00%	-11.89%
Latin America (ILF)	43.84	42.94	2.98%	-2.05%
U.S. 10yr. Tr.	1.85%	1.69%	-0.53%	8.65%
Spain 10yr. Bond	5.07%	4.91%	5.17%	3.16%
Oil	97.23	93.04	5.21%	-4.31%
Gold	1596.00	1580.20	6.14%	-0.99%

The returns of the tech-heavy NASDAQ continue to disappoint as Apple (AAPL) is still dead money. The submergence of the emerging markets is a sign that the global economy is not exactly healthy. China is now down 11.9% year-to-date! That was sure a short-lived move that it made late last year!

The U.S. bond market is now positive for the year, but that may also be a short-lived move- - stay tuned!

This judge and jury does not see enough evidence yet to convict this current Bull. I still see no reason to **not** keep the green flag flying for now. But, I continue to check my rear-view mirror several times per day!



Please follow me on Twitter @BillGunderson, 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>

Bill Gunderson's Model Portfolio for Investors seeking Aggressive/Moderate Growth.

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 up

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

I have chosen Neogen (NEOG) as my featured stock of the week. I like stocks that have performance, value, and a healthy stock chart. Neogen currently has all three.

Neogen Corp	
Sector	Medical
Market Cap	1,180,000,000
Size	Small-Cap
Risk Profile	Aggressive
Valuation 04/05/13	
Last Closing Price	\$49.40
Next Yr EPS Est	\$1.32
Forward PE Ratio	37.42
Est 5 Yr Annual Gr	18.50%

Valuation 04/05/13	
Last Closing Price	\$49.40
Next Yr EPS Est	\$1.32
Forward PE Ratio	37.42
Est 5 Yr Annual Gr	18.50%
PEG Ratio	2.02
5 Yr Target Price	\$98.00
Dividend Yield	0.00%
5 Yr Tot Ret Pot	98.4%
Gunderson Value Grade	
A	



Bill Gunderson's INCOME/GROWTH Model Portfolio

This portfolio is 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. This portfolio currently has an average yield of **6.2%**.

This portfolio is now up **8.58%** YTD and **16.31%** since its August 5, 2011 inception. This works out to an annualized rate of **9.77%**. Not bad for a CD alternative.

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

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

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

401-K Section (How is your 401k) portfolio doing?

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.

If you have a wide selection of mutual funds in your plan, here is my current basic recommendation:

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

401(k) Section (VERY BASIC)

Many folks have a very limited selection of choices in your 401-k. THIS NEW SECTION IS FOR YOU!

U.S. Large Cap 10.0%

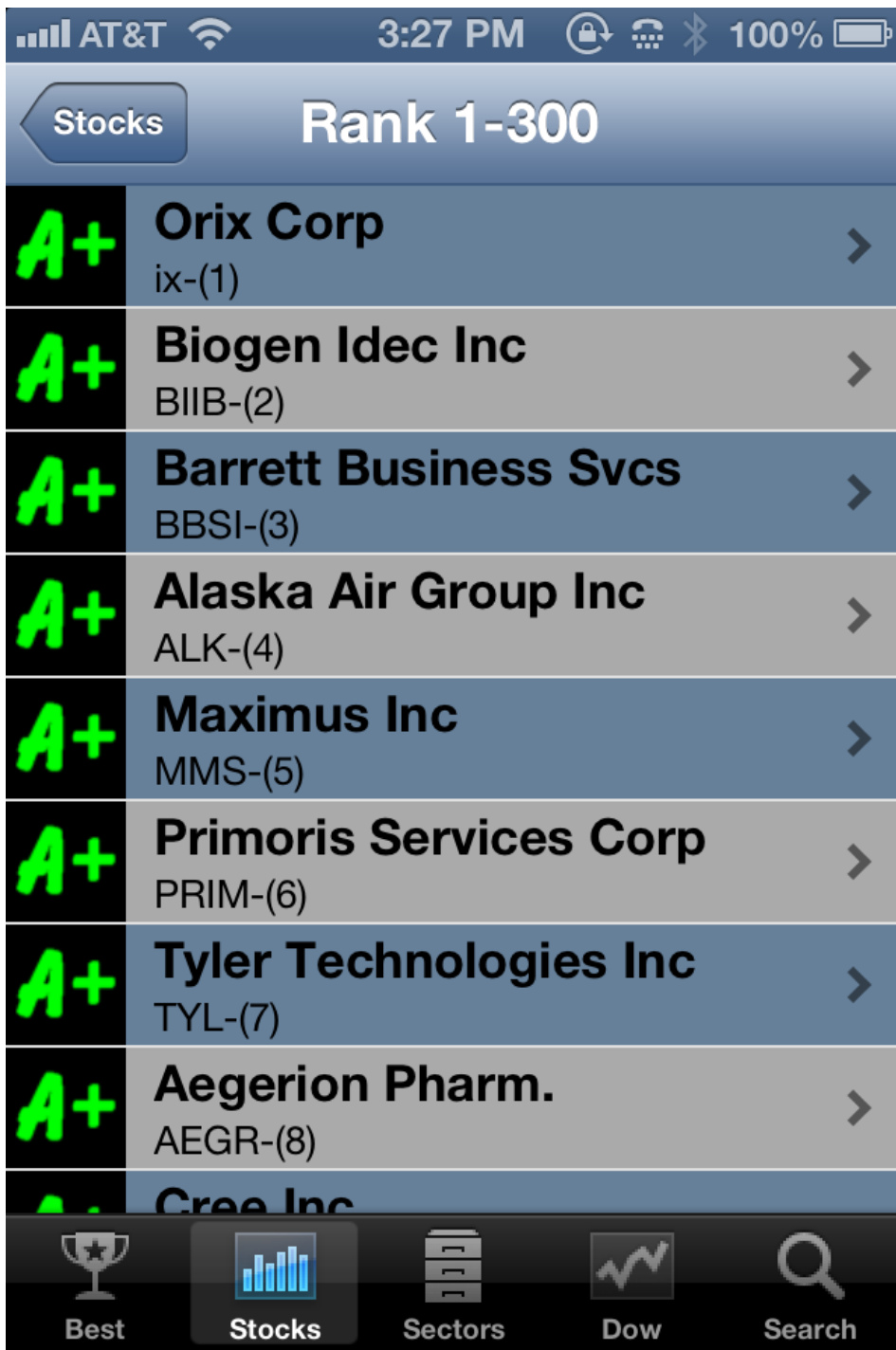
THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

Bill Gunderson's ETF Model Portfolio

This portfolio is for investors seeking growth. This portfolio is now up

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY

BILL GUNDERSON WEEKLY TOP 300 LIST:



This is just an appetizer, here is the full list.

THIS SECTION IS FOR CLIENTS AND SUBSCRIBERS ONLY, BUT HERE ARE 200-300

Bill Gunderson's

Best Stocks Now

Top 300 as of 4/5/2013

	One	Six	Three	Two	Six	One	Two	One	Yest.	Current	
	Year Ago	Mos. Ago	Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Rank	Rank	
	Rank	Rank	Rank	Rank	Rank	Rank	Rank	Rank	Rank	Rank	
A- VFC VF Corp		80	62	682	686	714	432	264	408	293	200
A- WRLD World Acceptance Corp		656	731	685	468	703	541	712	529	207	201
A- AWH Allied World Assurance		1615	980	1231	817	219	228	239	346	216	202
A- FLO Flowers Foods Inc		1113	1478	213	305	135	147	192	309	218	203
A- KKD Krispy Kreme Doughnuts Inc		1392	1294	207	91	160	165	270	106	116	204
A- OCN Ocwen Financial Corp		615	4	183	37	70	46	82	257	183	205
A- ASGN On Assignment		1034	12	281	28	176	174	33	67	109	206
A- BONT Bon Ton Stores Inc		2519	1925	645	1120	799	1434	294	311	269	207
A- AOS Smith AO Corp		185	90	119	4	13	34	56	40	195	209
A- ENB Enbridge		205	227	344	343	496	256	408	128	169	210
A- GY Gencorp Inc		1511	1465	1984	791	611	355	340	350	243	212
A- CRAY Cray Inc		1355	840	141	337	459	97	205	230	230	213
A- JOBS Fifty One Job Inc.		259	256	175	203	707	348	368	302	201	214
A- ORLY O'Reilly Automotive Inc		39	480	285	212	24	24	73	178	192	215
A- UPW ProShares Ultra Utilities		1528	1438	2181	1359	767	822	448	496	273	216
A- SSYS Stratasys Inc.		2483	272	123	47	348	732	390	355	274	217
A- KERX Keryx Biopharmaceuticals		1735	1416	3074	522	728	880	286	338	319	218
A- MLNX Mellanox Technologies		179	11	831	804	405	1034	608	809	220	219
A- DEST Destination Maternity		1036	161	421	397	227	813	283	240	212	220
A- ACTS Action Semiconductor		2575	2873	2352	986	761	718	447	376	236	221
A- AFSI Amtrust Fin. Svcs.		171	529	35	158	71	237	79	88	164	222
A- PCYC Pharmacyclics Inc		51	31	106	8	5	3	7	303	214	223
A- VRTX Vertex Pharmaceuticals		1142	709	665	759	739	587	247	207	239	224
A- HEES	0	0	0	0	0	0	0	0	0	386	225
A- OII Oceaneering Intl Inc		70	580	274	39	84	154	114	107	204	226
A- ABT Abbot Laboratories		1321	342	262	196	446	746	1071	1013	228	227
A- HNP Huaneng Pwr International Inc		1674	2205	134	63	88	138	262	61	107	228
A- PII Polaris Industries Inc		12	67	190	144	351	210	71	93	175	229
A- BEAV BE Aerospace Inc		297	310	435	628	409	648	404	131	225	230
A- ADS Alliance Data Systems Corp		138	160	40	118	224	133	202	235	203	231
A- ARMH A R M Holdings		1467	404	203	211	14	63	172	331	284	232
A- FEIC FEICo		955	674	82	195	26	71	257	177	205	233
A- ODFL Old Dominion Freight Lines		28	109	10	157	347	365	166	195	242	234
A- CEB Corp. Exec. Board		514	583	915	566	218	294	296	432	208	235
A- HTD John Hancock Tax Advantage Dividend Inco		390	224	750	683	308	530	369	314	255	237
A- EFC Eillington Financial		0	0	0	0	0	0	0	0	258	238
A- FXH Strataquant Healthcare Index		0	0	0	0	0	0	0	0	222	239
A- MA Mastercard		153	80	104	262	289	343	429	501	200	240
A- FTI F M C Technologies Inc		385	1022	1566	754	825	134	401	256	233	241
A- UGP Ultrapar Participacoes Adr		17	344	459	228	315	115	141	390	261	242
A- MDVN Medivation		80	17	339	68	366	1184	1452	1378	373	243
A- GMT GATX Corp		1033	465	399	261	205	187	187	244	223	244
A- MTZ Mastec Inc		1635	545	289	3	8	5	54	140	249	245
A- DFS Discover Financial Services		1026	800	966	1054	525	526	381	111	238	246
A- ABG Asbury Automotive Group Inc		422	158	107	89	45	295	69	116	194	247
A- CBI Chicago Bridge & Iron Co		292	1127	601	681	178	306	375	268	260	248
A- COO Cooper Companies Inc		384	57	477	357	108	255	235	182	173	249
A- GEL Genesis Energy Lp		306	670	220	227	180	79	163	194	278	250
A- KR Kroger Co		1817	1729	1316	1020	713	554	667	608	291	251

Bill Gunderson's

Best Stocks Now

Top 300 as of 4/5/2013

			One	Six	Three	Two	Six	One	Two	One	Yest.	Current	
			Year Ago	Mos. Ago	Mos. Ago	Mos. Ago	Wks. Ago	Mo. Ago	Wks. Ago	Wk. Ago	Rank	Rank	
			<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>	<u>Rank</u>	
A-	GEL	Genesis Energy Lp		306	670	220	227	180	79	163	194	278	250
A-	KR	Kroger Co		1817	1729	1316	1020	713	554	667	608	291	251
A-	ALEX	Alexander & Baldwin		1274	664	378	823	441	437	525	510	280	252
A-	FLT	Fleetcor Technologies		229	44	452	568	54	217	433	545	254	253
A-	SNI	Scripps Network		860	1297	890	571	552	288	317	447	370	254
A-	CNK	Cinemark Holdings		304	909	445	614	527	763	727	209	282	255
A-	CI	CIGNA Corp		1834	1056	1436	1546	781	1078	917	881	240	256
A-	IPAR	Inter Parfums Inc		959	881	572	398	130	135	413	323	285	257
A-	IEX	IDEX Corp		472	615	135	209	319	267	129	147	210	258
A-	KUB	Kubota Corp ADR		1233	1269	93	513	746	373	409	354	314	259
A-	MHK	Mohawk Ind Inc		1437	1390	76	175	83	181	253	286	300	260
A-	ISSC	Innovative Sltn & Support		2541	2608	1689	1027	1016	757	1133	1260	580	261
A-	ITIC	Investors Title Co		783	91	816	539	928	540	479	804	295	262
A-	LKQ	LKQ Corp		338	165	270	215	126	1182	962	1149	296	263
A-	AMSF	Amerisafe		1876	987	1501	1774	656	316	199	162	227	264
B+	IMGN	Immunogen Inc		63	393	305	237	795	202	151	196	537	265
B+	BX	Blackstone Group		1846	1763	886	135	222	238	364	201	259	266
B+	TJX	TJX Co Inc		71	198	560	269	458	595	640	389	268	267
B+	NWSA	News Corp		993	1275	1432	946	1145	177	246	279	271	268
B+	PDFS	PDF Solutions Inc		920	525	1613	1009	801	118	427	304	486	269
B+	BSFT	Broadsoft		1125	2287	1870	2748	951	2436	2704	1687	1341	270
B+	STWD	Starwood Property Trust		161	552	313	249	370	153	212	197	346	271
B+	ACMP	Access Midstream Ptnrs		1717	2219	532	451	240	287	338	370	257	272
B+	RRTS	Roadrunner Trans. System		0		2838	1901	1906	83	185	267	221	273
B+	UA	Under Armour		190	184	668	490	1015	961	492	473	302	274
B+	AHGP	Alliance Holdings		908	125	548	1057	269	274	605	589	430	275
B+	RUTH	Ruths Hospitality Group		1259	1419	709	1124	1361	198	288	419	313	276
B+	CSV	Carriage Services Inc		1474	1186	508	637	495	450	442	406	290	277
B+	NEU	Newmarket Corp.		287	154	200	344	562	444	402	296	305	278
B+	URI	United Rentals Inc		374	1008	81	27	137	201	512	90	306	279
B+	PKOH	Park Ohio Holding Corp		1378	883	1110	1269	1188	2262	711	471	338	280
B+	PNRA	Panera Bread		45	30	216	419	688	626	596	404	298	281
B+	SBGI	Sinclair Broadcast Group		2217	635	683	860	802	99	327	377	308	282
B+	UGE	Consumer Goods Index 2X		621	501	493	202	231	303	232	282	231	283
B+	CRI	Carters Inc		882	292	204	25	64	846	567	604	312	284
B+	ADC	Agree Realty		1112	196	963	774	542	503	451	997	320	285
B+	AMT	American Tower Corp		226	153	31	421	634	317	634	396	323	286
B+	CACC	Credit Acceptance Corp.		265	217	348	1087	268	230	255	164	189	287
B+	HCSG	Healthcare Services Grp Inc		59	338	350	458	452	597	357	301	262	288
B+	IMAX	Imax Corp		175	83	283	594	330	184	335	440	384	289
B+	NTESS	Netease.Com Inc ADR		22	152	808	443	281	362	513	484	301	290
B+	MPC	Marathon Petroleum		988	877	1398	1409	1773	1189			315	291
B+	AMP	Ameriprise Financial Inc		1858	1931	210	162	170	260	161	160	288	292
B+	VTR	Ventas Inc.		254	744	896	934	859	433	679	757	352	293
B+	ROP	Roper Industries Inc		244	155	538	557	695	31	154	297	297	294
B+	CBST	Cubist Pharmaceuticals		164	52	233	270	677	495	256	322	270	295
B+	EQIX	Equinix Inc		60	46	239	178	121	111	346	278	321	296
B+	HSTM	Healthstream		135	59	807	643	436	955	954	819	322	297
B+	CCE	Coca Cola Enterprises		478	771	906	829	312	296	333	308	277	299
B+	CLB	Core Laboratories NV		29	806	357	197	73	171	240	202	324	300

Bill Gunderson's Top 300 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.

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.



My Best Stocks Now Radio Hour is heard on the Salem Broadcast Network every weekday from 7:00am to 8:00am PST. **I HAVE DISCONTINUED MY SAN DIEGO SHOW. THE STATION'S SIGNAL IS JUST TOO WEAK.** I can now be heard in Atlanta.

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



I did not write any articles this past week for *MarketWatch*, *TheStreet.com*, or *Seeking Alpha*. You can see my recent articles for the *TheStreet* by clicking [here](#)

To see my recent articles for *MarketWatch* click [here](#)

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:

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