

Almanac Investor October Stock Basket October 11, 2017 Closes

Symbol	Name	Sector/Industry	General Business Description	Sales Growth	P/E	P/S Ratio	MV \$mil	Price 10/11/17	Yield	Buy Limit *	Stop Loss *
Small Cap <\$1Bil											
COHU	Cohu Inc	Computer and Tech	Semi equipment builder	4.6	24	2.2	676	24.19	0.99	20.20	15.55
LNTH	Lantheus Hldgs	Medical	Diagnostic imaging agents/products	2.9	18	2.2	698	18.70	N/A	17.32	13.34
RTEC	Rudolph Tech	Computer and Tech	Quality control systems for semi industry	5.0	28	3.4	839	26.70	N/A	24.86	19.14
Mid Cap >\$1 Bil & <\$5 Bil											
AAOI	Applied Optoele	Computer and Tech	Fiber-optic products	37.3	17	3.2	1,186	61.44	N/A	57.25	47.52
AGX	Argan Inc	Construction	Engineering, construction & telecom services	63.3	12	1.2	1,027	66.05	1.06	63.50	52.71
BLDR	Builders Firsts	Retail-Wholesale	Building products for residential construction	78.6	14	0.3	1,986	17.63	N/A	17.05	14.15
CUBI	Customers Bancp	Finance	Northeast bank, approx 20 locations	24.6	11	2.6	1,016	33.06	N/A	31.10	25.81
PLUS	Eplus Inc	Computer and Tech	IT products & services/software	10.4	25	1.0	1,369	96.65	N/A	90.50	75.12
IIVI	li-Vi Incorp	Industrial Products	Laser, fiber optic cables, UV filters	17.5	24	2.7	2,601	41.20	N/A	40.05	33.24
KBH	KB Home	Construction	Single-family builder	18.6	20	0.6	2,351	27.18	0.37	25.25	20.96
LGIH	LGI Homes Inc	Finance	Single-family builder: entry level	33.0	14	1.2	1,154	53.37	N/A	50.89	42.24
MTH	Meritage Homes	Construction	Single-family builder	18.0	13	0.6	1,935	48.00	N/A	44.95	37.31
ORBK	Orbotech Ltd	Computer and Tech	Quality control systems for semi industry	7.2	18	2.5	2,058	42.96	N/A	40.95	33.99
PATK	Patrick Inds	Construction	Wall/ceiling panels & siding products	32.8	21	1.0	1,415	84.10	N/A	80.10	66.48
Large Cap > \$5 Bil											
CBG	CBRE Group Inc	Finance	Property mgmt, loan servicing & origination	20.4	16	1.0	13,257	39.23	N/A	38.88	33.05
FAF	First Amer Finl	Finance	Title insurance & specialty insurance	7.7	15	1.0	5,566	50.27	3.02	48.95	41.61
G	Genpact Ltd	Business Services	Business process & IT service, delivery net.	4.5	20	2.2	5,646	29.27	0.82	28.50	24.23
HII	Huntington Ingalls	Aerospace	Builds/repairs U.S. Navy ships & subs	0.7	21	1.5	10,622	233.93	1.03	222.75	189.34
LII	Lennox Intl Inc	Construction	HVAC & Refrigeration	5.0	24	2.0	7,605	180.29	1.13	173.15	147.18
OC	Owens Corning	Construction	Building materials and glass fibers	6.1	21	1.5	8,879	79.85	1.00	76.50	65.03
SNX	Synnex Corp	Computer and Tech	Electronics wholesaler/distributor	5.4	15	0.3	5,307	132.79	0.75	118.65	100.85
TOL	Toll Brothers	Construction	Luxury home builder	23.9	16	1.3	7,063	43.18	0.74	40.75	34.64

* Buy Limits good til cancel, Stop only if closed below Stop Loss

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