

Name	Industry	Expected Sales Growth	FCF Mar Forecast	Enterprise Value to Sales	Supplier Customer Partner	Cheapness
Hon Hai Precision Industry Co., Ltd.	Computer Peripherals	7,00%	0,84%	0,24	SP	-1,46
Wistron Corporation	Computer Processing Hardware	13,66%	1,39%	0,45	SCP	-1,19
Foxconn Industrial Internet Co., Ltd. Class A	Telecommunications Equipment	15,21%	2,01%	0,88	SC	-0,70
SK hynix Inc.	Semiconductors	81,04%	18,50%	4,24	S	-0,60
Samsung Electronics Co., Ltd.	Telecommunications Equipment	16,96%	5,44%	1,67	SCP	-0,36
Jabil Inc.	Electronic Components	-17,86%	4,02%	0,51	S	-0,25
TTM Technologies, Inc.	Electronic Components	4,54%	4,02%	0,92	S	-0,19
Parade Technologies, Ltd.	Semiconductors	30,90%	20,08%	4,73	S	-0,18
Micron Technology, Inc.	Semiconductors	55,90%	3,12%	9,05	S	-0,12
Fabrinet	Semiconductors	7,51%	10,86%	2,32	SP	0,01
Taiwan Semiconductor Manufacturing Co., Ltd.	Semiconductors	23,29%	23,60%	8,82	SCP	0,15
AURAS Technology Co., Ltd.	Computer Peripherals	19,38%	6,42%	4,40	S	0,26
Dolby Laboratories, Inc. Class A	Packaged Software	0,04%	28,00%	5,72	S	0,32
Adobe Inc.	Packaged Software	10,63%	37,40%	11,91	SP	0,37
Qt Group Plc	Packaged Software	21,06%	19,96%	10,42	S	0,40
Oracle Corporation	Packaged Software	6,60%	21,42%	9,13	SCP	0,55
BE Semiconductor Industries N.V.	Industrial Machinery	33,09%	33,12%	21,11	S	0,68
Microsoft Corporation	Packaged Software	15,27%	27,40%	14,94	SCP	0,69
Rambus Inc.	Semiconductors	7,64%	31,41%	14,94	SP	0,73
ServiceNow, Inc.	Packaged Software	21,50%	30,95%	17,95	SCP	0,76
Equinix, Inc.	Real Estate Investment Trusts	8,13%	11,47%	11,27	SC	0,96
Global, Inc. Class A	Packaged Software	26,23%	4,16%	15,42	S	1,01
Intel Corporation	Semiconductors	6,11%	-14,88%	3,95	S	1,18
ARM Holdings PLC ADR	Semiconductors	18,53%	17,97%	47,99	SP	1,75
SoundHound AI, Inc. Class A	Packaged Software	51,49%	-63,84%	44,29	S	2,80
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Volvo Car AB Class B	Motor Vehicles	11,23%	-0,25%	0,22	P	-1,94
Li Auto, Inc. Class A	Motor Vehicles	63,32%	12,03%	1,09	PC	-1,51
BYD Company Limited Class H	Electrical Products	31,37%	5,17%	0,91	PC	-1,16
Asustek Computer Inc.	Computer Processing Hardware	18,81%	-4,22%	0,48	PC	-1,09
Continental AG	Automotive Aftermarket	2,83%	2,45%	0,46	PC	-0,77
Flex Ltd.	Electronic Production Equipment	-7,70%	2,65%	0,45	P	-0,64
Sopra Steria Group SA	Information Technology Services	9,68%	5,74%	0,98	P	-0,58
Nokia Oyj	Telecommunications Equipment	-1,07%	6,03%	0,68	P	-0,51
HP Inc.	Computer Processing Hardware	-0,09%	5,83%	0,71	PC	-0,47
Corsair Gaming, Inc.	Packaged Software	4,93%	6,22%	0,90	P	-0,44
Mobile Telecommunications Co. Saudi Arabia	Wireless Telecommunications	9,06%	14,79%	1,86	P	-0,33
Shutterstock, Inc.	Internet Software/Services	0,13%	20,63%	1,89	P	-0,22
Dropbox, Inc. Class A	Data Processing Services	1,74%	37,03%	3,67	PC	-0,12
Dell Technologies, Inc. Class C	Computer Processing Hardware	5,78%	5,23%	1,22	PC	-0,10
Mercedes-Benz Group AG	Motor Vehicles	-0,91%	5,68%	1,00	P	-0,07
Amgen Inc.	Pharmaceuticals: Major	17,25%	34,77%	7,24	P	-0,06
Parsons Corporation	Information Technology Services	9,26%	5,39%	1,77	P	-0,06
Amdocs Limited	Information Technology Services	3,13%	14,66%	2,20	P	-0,04
SoftBank Corp.	Wireless Telecommunications	4,13%	10,66%	2,25	PC	0,08
Comcast Corporation Class A	Cable/Satellite TV	2,26%	11,00%	2,16	P	0,08
Maxis Bhd.	Major Telecommunications	1,53%	22,64%	3,35	P	0,11
Cagemeini SE	Information Technology Services	2,10%	8,81%	1,79	P	0,13
Amazon.com, Inc.	Internet Retail	11,74%	10,44%	3,31	P	0,14
Roche Holding Ltd Dividend Right Cert.	Pharmaceuticals: Major	2,65%	22,15%	3,58	P	0,14
Thunder Software Technology Co., Ltd. Class A	Packaged Software	19,61%	5,80%	3,86	P	0,16
LianChuang Electronic Technology Co Ltd Class A	Electronic Production Equipment	-5,65%	5,68%	1,16	P	0,18
Siemens Aktiengesellschaft	Industrial Machinery	3,72%	10,74%	2,41	P	0,19
Getty Images Holdings, Inc. Class A	Internet Software/Services	2,85%	15,24%	3,21	P	0,22
Pure Storage, Inc. Class A	Computer Peripherals	10,50%	17,86%	5,94	PC	0,32
Apple Inc.	Telecommunications Equipment	1,32%	26,84%	6,76	P	0,37
Swisscom AG	Major Telecommunications	-0,11%	13,59%	3,09	P	0,37
Vitrox Corp. Bhd.	Semiconductors	32,08%	10,79%	11,18	P	0,39
Tata Communications Limited	Major Telecommunications	18,18%	-2,93%	3,38	P	0,39
Accenture Plc Class A	Information Technology Services	1,96%	13,43%	3,54	P	0,40
Walt Disney Company	Movies/Entertainment	3,29%	8,97%	3,04	P	0,41
Cisco Systems, Inc.	Information Technology Services	-8,11%	21,07%	3,24	P	0,46
Palo Alto Networks, Inc.	Packaged Software	15,94%	38,58%	15,28	P	0,47
Nutanix, Inc. Class A	Packaged Software	14,66%	19,80%	9,66	P	0,48
L&T Technology Services Ltd.	Engineering & Construction	19,32%	3,78%	6,82	P	0,51
Autodesk, Inc.	Packaged Software	9,89%	24,27%	10,42	P	0,57
ANSYS, Inc.	Packaged Software	9,40%	29,76%	13,63	P	0,65
Infinion Technologies AG	Semiconductors	-3,22%	5,29%	2,74	P	0,70
Arista Networks, Inc.	Computer Peripherals	12,62%	37,30%	15,55	P	0,70
Western Digital Corporation	Computer Peripherals	3,38%	-4,57%	2,46	P	0,71
Altair Engineering Inc. Class A	Packaged Software	9,02%	20,14%	12,13	P	0,75
ASML Holding NV	Semiconductors	0,50%	22,39%	12,81	P	0,94
Lattice Semiconductor Corporation	Semiconductors	-18,02%	31,08%	14,65	P	1,40
Verisilicon Microelectronics (Shanghai) Co., Ltd.	Semiconductors	-6,68%	-8,36%	7,52	P	1,76
Recursion Pharmaceuticals, Inc. Class A	Biotechnology	3,43%	-831,23%	46,17	P	3,37
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Geely Automobile Holdings Limited	Motor Vehicles	20,43%	5,17%	0,23	C	-2,31
Pegatron Corporation	Computer Processing Hardware	1,69%	-0,27%	0,19	C	-1,91
Dicker Data Limited	Electronics/Appliance Stores	49,96%	4,09%	0,99	C	-1,44
TD SYNNEX Corporation	Electronics Distributors	1,28%	1,98%	0,23	C	-1,39
LG Electronics Inc.	Electronics/Appliances	3,90%	3,29%	0,26	C	-1,28
XPeng, Inc. Class A	Motor Vehicles	63,58%	-7,62%	1,44	C	-1,15
Acer Incorporated	Computer Processing Hardware	7,77%	1,34%	0,40	C	-1,11
Lenovo Group Limited	Computer Processing Hardware	-9,23%	3,51%	0,25	C	-1,05
Computacenter Plc	Information Technology Services	1,75%	2,71%	0,26	C	-0,98
Micro-Star International Co., Ltd.	Computer Peripherals	11,41%	3,73%	0,63	C	-0,95
Gigabyte Technology Co., Ltd.	Computer Peripherals	40,28%	0,84%	1,36	C	-0,89
Arrow Electronics, Inc.	Electronics Distributors	-10,05%	-0,95%	0,32	C	-0,85
Isuzu Motors Limited	Motor Vehicles	6,85%	4,99%	0,60	C	-0,84
Com7 Public Co. Ltd.	Electronics/Appliance Stores	10,26%	3,26%	0,70	C	-0,82
Tata Motors Limited	Motor Vehicles	25,74%	7,20%	1,18	C	-0,79
Great Wall Motor Co., Ltd. Class H	Motor Vehicles	21,06%	3,26%	1,01	C	-0,76
PC Connection, Inc.	Information Technology Services	4,55%	2,03%	0,51	C	-0,76
CyberAgent, Inc.	Internet Software/Services	9,58%	1,11%	0,71	C	-0,64
Xiaomi Corp. Class B	Telecommunications Equipment	13,83%	3,96%	1,00	C	-0,57
Insight Enterprises, Inc.	Information Technology Services	7,93%	2,91%	0,84	C	-0,48
WPP Plc	Advertising/Marketing Services	-0,48%	7,68%	0,75	C	-0,46
Mitsui & Co. Ltd	Chemicals: Major Diversified	-7,68%	3,57%	0,61	C	-0,38
Super Micro Computer, Inc.	Computer Processing Hardware	105,49%	-1,92%	9,18	C	-0,33
Bayerische Motoren Werke AG	Motor Vehicles	0,53%	4,15%	0,80	C	-0,30
Cosmo Pharmaceuticals NV	Pharmaceuticals: Major	108,72%	38,28%	12,97	C	-0,28
Quectel Wireless Solutions Co. Ltd. Class A	Electronic Production Equipment	-0,86%	-0,15%	0,78	C	-0,20
Aptiv Plc	Auto Parts: OEM	7,21%	5,32%	1,24	C	-0,13
Lite-On Technology Corp.	Computer Peripherals	4,15%	8,86%	1,34	C	-0,12
Rolls-Royce Holdings plc	Aerospace & Defense	9,44%	11,23%	2,27	C	-0,09
Fujitsu Limited	Information Technology Services	2,24%	4,20%	1,05	C	-0,06
Aston Martin Lagonda Global Holdings Plc	Motor Vehicles	12,83%	-2,84%	1,41	C	0,05
AT&T Inc.	Wireless Telecommunications	1,03%	14,05%	2,27	C	0,08
Singapore Telecommunications Limited	Major Telecommunications	-0,52%	16,62%	2,47	C	0,13
Alphabet Inc. Class A	Internet Software/Services	11,53%	23,52%	5,96	C	0,22
Meta Platforms Inc Class A	Internet Software/Services	17,23%	30,03%	9,57	C	0,22
CDW Corporation	Information Technology Services	3,21%	5,41%	1,86	C	0,23
Royal KPN NV	Major Telecommunications	2,29%	16,55%	3,33	C	0,25
HCL Technologies Limited	Information Technology Services	8,62%	13,93%	3,86	C	0,26
Infosys Limited	Information Technology Services	3,56%	16,18%	3,95	C	0,38
Reliance Industries Limited	Oil Refining/Marketing	6,47%	-1,57%	2,31	C	0,39
Softcat Plc	Information Technology Services	2,92%	9,40%	3,15	C	0,45
CCC Intelligent Solutions Holdings Inc	Packaged Software	9,14%	26,73%	9,89	C	0,46
Advantech Co., Ltd.	Computer Processing Hardware	7,40%	12,60%	4,92	C	0,51
ON Semiconductor Corporation	Semiconductors	-9,18%	23,05%	4,20	C	0,63
SAP SE	Packaged Software	8,92%	11,75%	7,27	C	0,64
Mercury Systems, Inc.	Aerospace & Defense	-15,84%	1,67%	2,18	C	0,89
Snowflake, Inc. Class A	Packaged Software	22,40%	28,23%	19,86	C	0,89
Synopsys, Inc.	Packaged Software	11,99%	19,00%	15,57	C	1,09
Cadence Design Systems, Inc.	Packaged Software	12,19%	29,82%	21,47	C	1,18