

Daily Triple Plays Report

An earnings “triple play” is a term coined by Bespoke for a stock that beats earnings estimates, beats revenue estimates, and raises guidance on its most recent earnings report. We consider these stocks the cream of the crop during earnings season, and we continuously monitor them for potential long opportunities. Below and on page two is a list of the stocks that have reported triple plays over the last 40 days. Price charts of today’s new triple plays (shaded in yellow below) are included as well.

Stock	Company	Sector	Report Date	AM/PM	% Chg on Report Day	S&P 500
AMAT	Applied Materials	Information Technology	2/16/2012	PM	2.74	AMAT
VCI	Valassis	Consumer Discretionary	2/16/2012	AM	15.19	
VDSI	VASCO Data Security	Information Technology	2/16/2012	AM	-3.18	
NVMI	Nova Measuring	Information Technology	2/15/2012	AM	-4.77	
CNMD	CONMED	Health Care	2/15/2012	AM	1.33	
WCG	WellCare Group	Health Care	2/15/2012	AM	9.18	
VMI	Valmont	Industrials	2/14/2012	PM	0.89	
ASGN	On Assignment	Industrials	2/14/2012	AM	14.49	
GNRC	Generac	Industrials	2/14/2012	AM	-11.19	
UCTT	Ultra Clean Holdings	Information Technology	2/13/2012	PM	13.46	
DBD	Diebold	Information Technology	2/13/2012	AM	9.18	
MPWR	Monolithic Power	Information Technology	2/9/2012	PM	4.49	
BRKS	Brooks Automation	Information Technology	2/9/2012	PM	6.82	
PM	Philip Morris International	Consumer Staples	2/9/2012	D	2.80	PM
HPY	Heartland Payment Systems	Information Technology	2/9/2012	AM	9.67	
FMC	FMC Corp	Materials	2/8/2012	PM	-2.42	FMC
RRTS	Roadrunner Transportation	Industrials	2/8/2012	PM	10.25	
SCSS	Select Comfort	Consumer Discretionary	2/8/2012	PM	5.34	
ENS	Energys	Industrials	2/8/2012	PM	4.36	
FLT	FleetCor	Information Technology	2/8/2012	PM	2.83	
TCO	Taubman Centers	Financials	2/8/2012	PM	1.25	
GTS	Triple-S Management	Health Care	2/8/2012	AM	6.65	
GUID	Guidance Software	Information Technology	2/7/2012	PM	34.15	
IMI	Intermolecular	Information Technology	2/7/2012	PM	4.99	
PRGO	Perrigo	Health Care	2/7/2012	AM	1.33	PRGO
TDG	Transdigm Group	Industrials	2/7/2012	AM	5.96	
CHD	Church & Dwight	Consumer Staples	2/7/2012	AM	5.28	
MMP	Magellan Midstream	Energy	2/7/2012	AM	0.35	
DNB	Dun & Bradstreet	Industrials	2/6/2012	PM	-4.79	DNB
PKI	PerkinElmer	Health Care	2/2/2012	PM	6.24	PKI
MFLX	Multi-Fineline	Information Technology	2/2/2012	PM	6.93	
TRMB	Trimble Navigation	Information Technology	2/2/2012	PM	5.59	
SIMO	Silicon Motion	Information Technology	2/2/2012	PM	2.16	
NSR	Neustar	Information Technology	2/2/2012	PM	-0.71	
CMI	Cummins	Industrials	2/2/2012	AM	7.08	CMI

Triple plays continued...

Stock	Company	Sector	Report Date	AM/PM	% Chg on	
					Report Day	S&P 500
MWIV	MWI Veterinary Supply	Health Care	2/2/2012	AM	5.58	
LSTR	Landstar System	Industrials	2/2/2012	AM	-0.62	
MKSI	MKS Instruments	Information Technology	2/1/2012	PM	0.25	
COCO	Corinthian Colleges	Consumer Discretionary	2/1/2012	AM	36.30	
DSPG	DSP Group	Information Technology	2/1/2012	AM	7.69	
STX	Seagate Tech	Information Technology	1/31/2012	PM	20.77	
UBNT	Ubiquiti Networks	Information Technology	1/31/2012	PM	-0.74	
MSPD	Mindspeed	Information Technology	1/30/2012	PM	13.65	
CRUS	Cirrus Logic	Information Technology	1/26/2012	PM	-8.34	
CAT	Caterpillar	Industrials	1/26/2012	AM	2.07	CAT
ACAT	Arctic Cat	Consumer Discretionary	1/26/2012	AM	20.03	
NEI	Network Engines	Information Technology	1/26/2012	AM	-1.31	
TER	Teradyne	Information Technology	1/25/2012	PM	1.74	TER
TXT	Textron	Industrials	1/25/2012	AM	14.58	TXT
SLAB	Silicon Labs	Information Technology	1/25/2012	AM	-0.64	
AAPL	Apple	Information Technology	1/24/2012	PM	6.24	AAPL
CA	CA Tech	Information Technology	1/24/2012	PM	9.68	CA
EFII	Elec For Imaging	Information Technology	1/24/2012	PM	4.26	
ISRG	Intuitive Surgical	Health Care	1/19/2012	PM	-6.10	ISRG
FFIV	F5 Networks	Information Technology	1/18/2012	PM	10.64	FFIV
XLNX	Xilinx	Information Technology	1/18/2012	PM	0.96	XLNX
PLXS	Plexus	Information Technology	1/18/2012	PM	9.77	
APH	Amphenol	Information Technology	1/18/2012	AM	10.96	APH
TSM	Taiwan Semi	Information Technology	1/18/2012	AM	2.75	
ASML	ASML	Information Technology	1/18/2012	AM	-0.87	

Charts of today's new triple play stocks:

Applied Materials (AMAT): Last Six Months

