



# BESPOKE Investment Group International Revenue Database

While not closely followed, a company's geographic revenue exposure can have a big impact on its stock price movement. US companies that generate a large portion of their revenues in Europe or Asia are impacted significantly by the economic cycles of these two regions, while companies that generate all or most of their revenues inside the US move more in-line with the domestic economy. In recent years, when the US lagged behind the rest of the world in terms of economic growth, the companies with heavy international revenue exposure significantly outperformed the companies with mostly domestic exposure. Conversely, when the US has outperformed Europe and Asia, the domestic companies have routinely outperformed.

To invest using these global trends, you obviously need to know which companies are exposed the most to international and domestic revenue streams. Our *Interactive International Revenues Database* has this important data for all of the stocks in the S&P 500 and Russell 1,000. There's simply no better place to find this geographic revenue breakdown.

| BESPOKE Investment Group<br>International Revenues Database |                               | Russell 1000 International vs Domestic Revenues |      |      | Russell 1000 International vs Domestic Revenues |      |      |      |
|---|-------------------------------|---|------|------|---|------|------|------|
| Ticker  | Company                       | Industry  | 2009 | 2010 | 2011  | 2009 | 2010 | 2011 |
| A   | Agilent Technologies Inc      | Health Care                                     | 38   | 52   | 50  | 47   | 48   | 70   |
| AL  | Alcoa Inc                     | Materials                                       | 52   | 50   | 40  | 48   | 50   | 70   |
| AMN   | American Airlines             | Consumer Discret                                | 100  | 100  | 100   | 0    | 0    | 0    |
| AMP   | Advanced Auto Parts Inc       | Consumer Discret                                | 100  | 100  | 100   | 0    | 0    | 0    |
| APPL  | Apple Inc                     | Technology                                      | 44   | 54   | 55  | 56   | 62   | 68   |
| ABT   | Abbott Laboratories           | Health Care                                     | 47   | 48   | 45  | 59   | 57   | 59   |
| ACAD  | American Capital Ltd          | Financials                                      | 96   | 95   | 95  | 4    | 5    | 5    |
| ACF   | ACF Corp                      | Financials                                      | 40   | 41   | 41  | 37   | 36   | 36   |
| ACT   | Actavis Inc                   | Pharmaceuticals                                 | 0    | 0    | 0   | 0    | 0    | 0    |
| ACTV  | Activision Blizzard Inc       | Technology                                      | 0    | 0    | 0   | 0    | 0    | 0    |
| AD  | Amgen Inc                     | Health Care                                     | 46   | 46   | 46  | 42   | 44   | 44   |
| ADSK  | Autodesk Inc                  | Technology                                      | 46   | 46   | 46  | 42   | 44   | 44   |
| ADT   | ADT Security Services Inc     | Security  | 100  | 100  | 100   | 0    | 0    | 0    |
| ADP   | Automatic Data Processing Inc | Technology                                      | 46   | 46   | 46  | 42   | 44   | 44   |
| ADBE  | Adobe Systems Inc             | Technology                                      | 46   | 46   | 46  | 42   | 44   | 44   |
| ADG   | Adage Inc                     | Technology                                      | 46   | 46   | 46  | 42   | 44   | 44   |
| ADH   | Adiantum Inc                  | Health Care                                     | 46   | 46   | 46  | 42   | 44   | 44   |
| ADI   | Analog Devices Inc            | Technology                                      | 46   | 46   | 46  | 42   | 44   | 44   |
| ADM   | Archer-Daniels-Midland Co     | Food Products                                   | 100  | 100  | 100   | 0    | 0    | 0    |
| ADP   | Automatic Data Processing Inc | Technology                                      | 46   | 46   | 46  | 42   | 44   | 44   |
| ADSE  | Adaptive Systems Corp         | Technology                                      | 46   | 46   | 46  | 42   | 44   | 44   |
| ADSK  | Autodesk Inc                  | Technology                                      | 46   | 46   | 46  | 42   | 44   | 44   |
| ADT   | ADT Security Services Inc     | Security  | 100  | 100  | 100   | 0    | 0    | 0    |
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| ADP   |                               |   |      |      |   |      |      |      |