



Earnings Triple Plays

Long-term Bespoke subscribers know how much we like earnings triple plays, but for those that haven't heard of the term, we came up with it back in the mid-2000s. An earnings triple play is a company that beats EPS estimates, beats revenue estimates, and raises forward guidance all in the same quarterly earnings report. *Investopedia.com* is one of the best online resources for financial markets education, and [they've actually given us credit](#) for coining the "triple play" term on their website. We consider triple play stocks to be the cream of the crop of earnings season, and we are constantly finding new long-term buy opportunities from this basket of names each quarter.

So far this earnings season, the net positive guidance spread (spread between companies raising guidance minus lowering guidance) is at its highest level in six years. Companies are finally getting aggressively bullish on the future. With the increased number of companies raising guidance, there's also been a significant pickup in the number of triple plays this season. Just since Wednesday's close, there have been 25! We can't remember a day in the 15+ years we've been doing this where that many triple plays were registered.

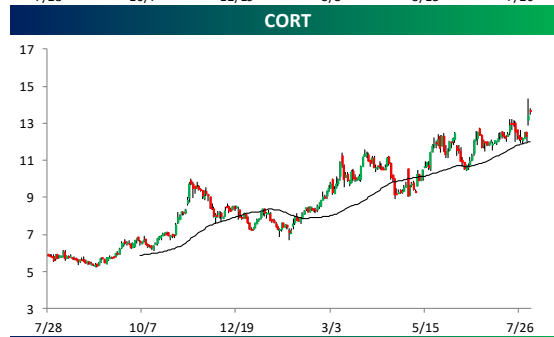
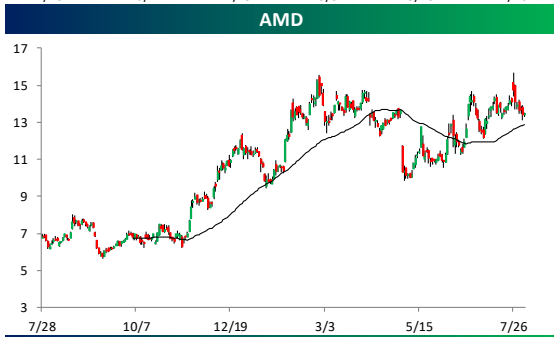
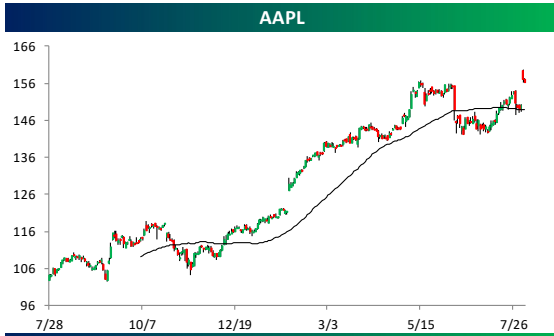
Since earnings season began back in early July, there have been 103 total triple plays. Last season there were 102 for the entire reporting period, and we still have two weeks to go this season. On pages four and five of this report, we provide a full list of this season's 103 triple plays. But to further filter the list of 103 names, we analyzed the chart patterns for each of them to identify the ones that currently look the best from a momentum/technical perspective. Below is a list of the 20 stocks that currently look the most intriguing to us at their current price levels. Some of them are experiencing upside breakouts to all-time highs, while others have been beaten down significantly and are finally breaking out of those downtrends. If you are looking to gain exposure to certain areas of the market and need some individual stock ideas, we recommend taking a good look at the 20 names below. *As is always the case with stock lists that we highlight, this is only meant to be a starting point for additional research into each name.* Price charts for each stock listed below are included on pages two and three.

Top Earnings Season Triple Plays: 8/3/17

Stock	Company	Sector	Report Date	AM/PM	EPS	Revenues	Guidance	Last Price	% Chg on Earnings	S&P 500
AAPL	Apple	Technology	8/1/2017	PM	Beat	Beat	Raised	155.64	4.73	AAPL
AIMC	Altra Industrial Motion	Industrials	7/25/2017	AM	Beat	Beat	Raised	44.35	7.70	
AMD	Advanced Micro	Technology	7/25/2017	PM	Beat	Beat	Raised	13.39	4.61	AMD
AVY	Avery Dennison	Materials	7/25/2017	AM	Beat	Beat	Raised	93.88	-2.86	AVY
B	Barnes Group	Industrials	7/28/2017	AM	Beat	Beat	Raised	60.22	1.29	
CORT	Corcept Therapeutics	Health Care	8/1/2017	PM	Beat	Beat	Raised	13.79	8.78	
HIIQ	Health Insurance Innov.	Financials	8/2/2017	PM	Beat	Beat	Raised	30.20	12.41	
LMAT	Lemaitre Vascular	Health Care	7/27/2017	PM	Beat	Beat	Raised	33.29	19.51	
LPT	Liberty Prop	Real Estate	7/25/2017	AM	Beat	Beat	Raised	42.29	-0.39	
MCO	Moody's	Financials	7/21/2017	AM	Beat	Beat	Raised	128.60	4.25	MCO
MPWR	Monolithic Power	Technology	7/26/2017	PM	Beat	Beat	Raised	101.68	-2.07	
MTOR	Meritor	Industrials	8/2/2017	AM	Beat	Beat	Raised	18.53	6.18	
OSUR	OraSure	Health Care	8/2/2017	PM	Beat	Beat	Raised	20.13	14.59	
PKG	Packaging Corp	Materials	7/26/2017	PM	Beat	Beat	Raised	110.62	1.61	
RCL	Royal Caribbean	Cons. Discret.	8/1/2017	AM	Beat	Beat	Raised	119.80	3.36	RCL
RGEN	Repligen	Health Care	8/3/2017	AM	Beat	Beat	Raised	42.64	3.93	
SCI	Service Corp	Cons. Discret.	7/26/2017	PM	Beat	Beat	Raised	34.73	4.18	
VAC	Marriot Vacations	Cons. Discret.	8/3/2017	AM	Beat	Beat	Raised	118.37	5.61	
VSH	Vishay	Technology	8/3/2017	AM	Beat	Beat	Raised	17.55	-1.56	
XENT	Intersect ENT	Health Care	8/1/2017	PM	Beat	Beat	Raised	30.20	9.26	

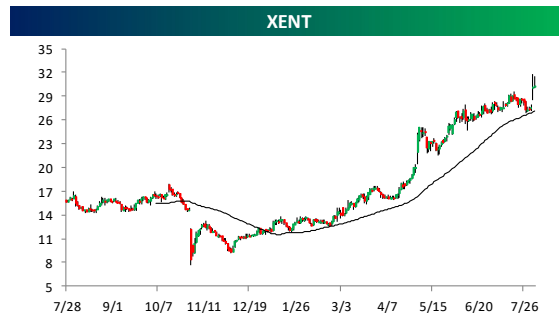
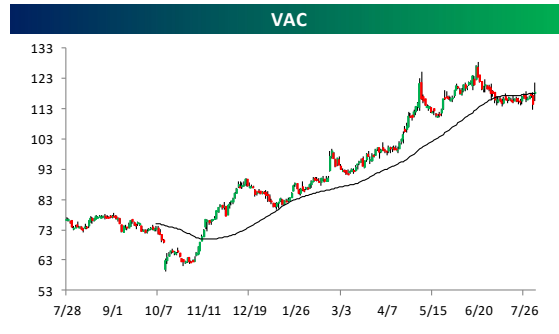
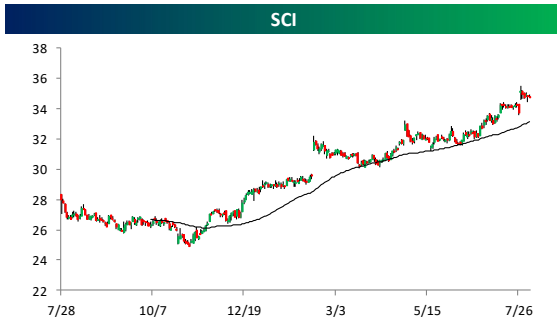
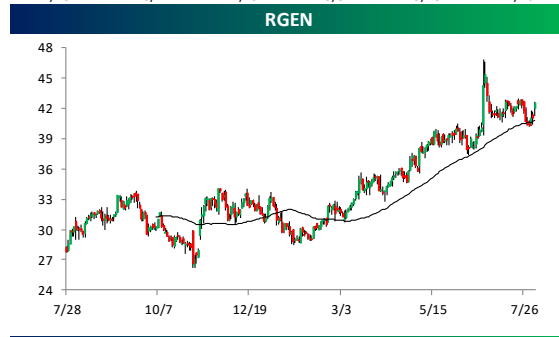
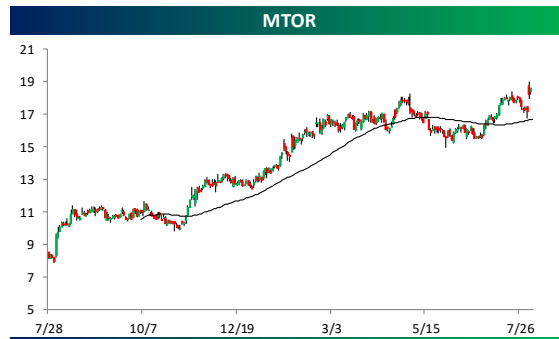
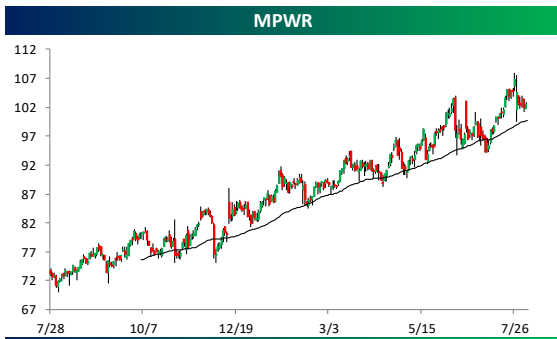


Charts of top triple plays featured on page one:





Charts of top triple plays featured on page one:





List of this season's earnings triple plays sorted by sector:

Earnings Season Triple Plays: 8/3/17

Stock	Company	Sector	Report Date	AM/PM	EPS	Revenues	Guidance	Last Price	% Chg on Earnings	S&P 500
AAN	Aaron's	Cons. Discret.	7/28/2017	AM	Beat	Beat	Raised	45.91	17.04	
GRMN	Garmin	Cons. Discret.	8/2/2017	AM	Beat	Beat	Raised	52.17	4.46	GRMN
IRBT	iRobot	Cons. Discret.	7/25/2017	PM	Beat	Beat	Raised	103.99	21.15	
LEA	Lear	Cons. Discret.	7/26/2017	AM	Beat	Beat	Raised	145.58	3.18	
LKQ	LKQ	Cons. Discret.	7/27/2017	AM	Beat	Beat	Raised	34.22	3.26	LKQ
RCL	Royal Caribbean	Cons. Discret.	8/1/2017	AM	Beat	Beat	Raised	119.80	3.36	RCL
SCI	Service Corp	Cons. Discret.	7/26/2017	PM	Beat	Beat	Raised	34.73	4.18	
SNE	Sony	Cons. Discret.	8/1/2017	AM	Beat	Beat	Raised	39.87	-0.88	
SRI	Stoneridge	Cons. Discret.	8/2/2017	PM	Beat	Beat	Raised	18.06	13.95	
TAL	TAL Education	Cons. Discret.	7/27/2017	AM	Beat	Beat	Raised	153.71	-0.48	
VAC	Marriott Vacations	Cons. Discret.	8/3/2017	AM	Beat	Beat	Raised	118.37	5.61	
CENT	Central Garden	Cons. Staples	8/2/2017	PM	Beat	Beat	Raised	35.41	17.56	
PG	Procter & Gamble	Cons. Staples	7/27/2017	AM	Beat	Beat	Raised	91.50	1.55	PG
SAM	Boston Beer Co	Cons. Staples	7/27/2017	PM	Beat	Beat	Raised	155.10	13.56	
WG	Willbros Group	Energy	7/31/2017	PM	Beat	Beat	Raised	2.20	3.92	
HIIQ	Health Insurance Innov.	Financials	8/2/2017	PM	Beat	Beat	Raised	30.20	12.41	
MCO	Moody's	Financials	7/21/2017	AM	Beat	Beat	Raised	128.60	4.25	MCO
TRI	Thomson Reuters	Financials	8/1/2017	AM	Beat	Beat	Raised	47.56	4.51	
AET	Aetna	Health Care	8/3/2017	AM	Beat	Beat	Raised	158.37	3.39	AET
AGN	Allergan	Health Care	8/3/2017	AM	Beat	Beat	Raised	248.80	-1.02	AGN
BAX	Baxter	Health Care	7/26/2017	AM	Beat	Beat	Raised	59.61	-1.40	BAX
BIIB	Biogen	Health Care	7/25/2017	AM	Beat	Beat	Raised	286.26	-0.61	BIIB
CHE	Chemed	Health Care	7/25/2017	PM	Beat	Beat	Raised	197.23	-0.10	
CORT	Corcept Therapeutics	Health Care	8/1/2017	PM	Beat	Beat	Raised	13.79	8.78	
ICLR	ICON plc	Health Care	7/27/2017	AM	Beat	Beat	Raised	106.73	6.39	
IDXX	IDEXX Labs	Health Care	8/1/2017	AM	Beat	Beat	Raised	151.96	-7.08	IDXX
IMGN	Immunogen	Health Care	7/28/2017	AM	Beat	Beat	Raised	5.23	14.29	
LHCG	LHC Group	Health Care	8/2/2017	PM	Beat	Beat	Raised	58.71	0.42	
LMAT	Lemaitre Vascular	Health Care	7/27/2017	PM	Beat	Beat	Raised	33.29	19.51	
MASI	Masimo	Health Care	8/2/2017	PM	Beat	Beat	Raised	86.85	-10.19	
MMSI	Merit Medical	Health Care	7/26/2017	PM	Beat	Beat	Raised	41.05	7.67	
OSUR	OraSure	Health Care	8/2/2017	PM	Beat	Beat	Raised	20.13	14.59	
RGEN	Repligen	Health Care	8/3/2017	AM	Beat	Beat	Raised	42.64	3.93	
SRDX	Surmodics	Health Care	8/3/2017	AM	Beat	Beat	Raised	26.90	4.28	
SRPT	Sarepta Therapeutics	Health Care	7/19/2017	PM	Beat	Beat	Raised	37.61	20.10	
TFX	Teleflex	Health Care	8/3/2017	AM	Beat	Beat	Raised	208.19	0.85	
TMO	Thermo Fisher	Health Care	7/26/2017	AM	Beat	Beat	Raised	175.48	-2.81	TMO
XENT	Intersect ENT	Health Care	8/1/2017	PM	Beat	Beat	Raised	30.20	9.26	
AGCO	AGCO Corp	Industrials	7/27/2017	AM	Beat	Beat	Raised	72.16	0.63	
AIMC	Altra Industrial Motion	Industrials	7/25/2017	AM	Beat	Beat	Raised	44.35	7.70	
ALSN	Allison Transmission	Industrials	7/31/2017	PM	Beat	Beat	Raised	37.77	-0.03	
ARC	ARC Document Solutions	Industrials	8/1/2017	PM	Beat	Beat	Raised	3.93	10.26	
B	Barnes Group	Industrials	7/28/2017	AM	Beat	Beat	Raised	60.22	1.29	
BCO	Brinks	Industrials	7/26/2017	AM	Beat	Beat	Raised	77.85	13.72	
CAT	Caterpillar	Industrials	7/25/2017	AM	Beat	Beat	Raised	113.59	5.88	CAT
CBZ	CBIZ	Industrials	8/3/2017	AM	Beat	Beat	Raised	14.85	-0.34	
CRAI	Charles River Associates	Industrials	7/27/2017	AM	Beat	Beat	Raised	37.83	12.70	
HSC	Harsco	Industrials	8/3/2017	AM	Beat	Beat	Raised	16.46	6.11	
IEX	IDEX Corp	Industrials	7/25/2017	PM	Beat	Beat	Raised	115.52	3.45	
MTOR	Meritor	Industrials	8/2/2017	AM	Beat	Beat	Raised	18.53	6.18	
OSK	Oshkosh	Industrials	8/2/2017	AM	Beat	Beat	Raised	73.87	5.36	
SPAR	Spartan Motors	Industrials	8/2/2017	AM	Beat	Beat	Raised	9.65	3.95	



List of this season's earnings triple plays sorted by sector (continued):

Earnings Season Triple Plays: 8/3/17 (continued)										
Stock	Company	Sector	Report Date	AM/PM	EPS	Revenues	Guidance	Last Price	% Chg on Earnings	S&P 500
SPR	Spirit Aerosystems	Industrials	8/2/2017	AM	Beat	Beat	Raised	72.10	17.55	
TDY	Teledyne Tech	Industrials	8/3/2017	AM	Beat	Beat	Raised	142.33	3.20	
TEX	Terex	Industrials	8/1/2017	PM	Beat	Beat	Raised	38.56	-3.32	
TKR	Timken	Industrials	7/26/2017	AM	Beat	Beat	Raised	44.75	-7.19	
URI	United Rentals	Industrials	7/19/2017	PM	Beat	Beat	Raised	116.04	3.24	URI
WBC	WABCO Holdings	Industrials	7/20/2017	AM	Beat	Beat	Raised	138.04	3.98	
AVY	Avery Dennison	Materials	7/25/2017	AM	Beat	Beat	Raised	93.88	-2.86	AVY
FOE	Ferro	Materials	7/26/2017	PM	Beat	Beat	Raised	19.41	-0.42	
PKG	Packaging Corp	Materials	7/26/2017	PM	Beat	Beat	Raised	110.62	1.61	
CTRE	CareTrust REIT	Real Estate	8/2/2017	PM	Beat	Beat	Raised	18.03	1.38	
EXR	Extra Space Storage	Real Estate	8/1/2017	PM	Beat	Beat	Raised	77.98	-0.04	EXR
LPT	Liberty Prop	Real Estate	7/25/2017	AM	Beat	Beat	Raised	42.29	-0.39	
PLD	Prologis	Real Estate	7/18/2017	AM	Beat	Beat	Raised	61.07	2.73	PLD
RLGY	Realty	Real Estate	8/3/2017	AM	Beat	Beat	Raised	33.85	3.85	
WRI	Weingarten Realty	Real Estate	7/27/2017	PM	Beat	Beat	Raised	32.36	0.06	
AAPL	Apple	Technology	8/1/2017	PM	Beat	Beat	Raised	155.64	4.73	AAPL
AEIS	Advanced Energy	Technology	7/31/2017	PM	Beat	Beat	Raised	70.49	-0.22	
AMD	Advanced Micro	Technology	7/25/2017	PM	Beat	Beat	Raised	13.39	4.61	AMD
APH	Amphenol	Technology	7/26/2017	AM	Beat	Beat	Raised	77.99	-1.19	APH
ARW	Arrow Elec	Technology	8/3/2017	AM	Beat	Beat	Raised	82.09	1.13	
ASML	ASML	Technology	7/19/2017	AM	Beat	Beat	Raised	151.95	5.15	
BIDU	Baidu.com	Technology	7/27/2017	PM	Beat	Beat	Raised	221.15	9.45	
CA	CA Tech	Technology	8/2/2017	PM	Beat	Beat	Raised	31.77	2.50	CA
CDK	CDK Global	Technology	8/1/2017	AM	Beat	Beat	Raised	61.83	-2.68	
CGNX	Cognex	Technology	7/31/2017	PM	Beat	Beat	Raised	102.59	10.75	
CRTO	Criteo	Technology	8/2/2017	AM	Beat	Beat	Raised	50.62	-2.61	
CY	Cypress Semi	Technology	7/27/2017	PM	Beat	Beat	Raised	14.13	0.14	
EEFT	Euronet	Technology	7/25/2017	PM	Beat	Beat	Raised	96.93	1.48	
ENTG	Entegris	Technology	7/27/2017	AM	Beat	Beat	Raised	25.10	2.90	
ESIO	Electro Scientific	Technology	8/2/2017	PM	Beat	Beat	Raised	9.47	14.62	
EXLS	ExlService	Technology	7/27/2017	AM	Beat	Beat	Raised	57.64	1.20	
FORM	FormFactor	Technology	8/2/2017	PM	Beat	Beat	Raised	14.30	11.87	
HUBS	HubSpot	Technology	8/2/2017	PM	Beat	Beat	Raised	72.40	4.85	
INTC	Intel	Technology	7/27/2017	PM	Beat	Beat	Raised	36.25	0.97	INTC
IPGP	IPG Photonics	Technology	8/1/2017	AM	Beat	Beat	Raised	162.70	9.01	
LLNW	Limelight Networks	Technology	7/26/2017	PM	Beat	Beat	Raised	3.38	4.78	
LRCX	Lam Research	Technology	7/26/2017	PM	Beat	Beat	Raised	149.47	-2.13	LRCX
MKSI	MKS Instruments	Technology	7/25/2017	PM	Beat	Beat	Raised	76.95	2.78	
MPWR	Monolithic Power	Technology	7/26/2017	PM	Beat	Beat	Raised	101.68	-2.07	
NOW	ServiceNow	Technology	7/26/2017	PM	Beat	Beat	Raised	106.88	0.75	
PFPT	Proofpoint	Technology	7/27/2017	PM	Beat	Beat	Raised	86.49	0.66	
SHOP	Shopify	Technology	8/1/2017	AM	Beat	Beat	Raised	98.75	12.68	
SLAB	Silicon Labs	Technology	7/26/2017	AM	Beat	Beat	Raised	76.35	11.00	
STMP	Stamps.com	Technology	8/2/2017	PM	Beat	Beat	Raised	192.55	30.50	
SWKS	Skyworks	Technology	7/20/2017	PM	Beat	Beat	Raised	102.70	-0.16	SWKS
TER	Teradyne	Technology	7/26/2017	PM	Beat	Beat	Raised	33.25	-6.58	
UCTT	Ultra Clean Holdings	Technology	7/27/2017	PM	Beat	Beat	Raised	21.17	-0.73	
VSH	Vishay	Technology	8/3/2017	AM	Beat	Beat	Raised	17.55	-1.56	
VSM	Versum Materials	Technology	8/1/2017	AM	Beat	Beat	Raised	36.10	3.49	
YRD	Yirendai	Technology	8/1/2017	AM	Beat	Beat	Raised	30.78	-12.21	
VG	Vonage	Telecom	8/3/2017	AM	Beat	Beat	Raised	7.18	9.17	