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EPS Changes: 4% or Less

DAILY

Changes from 28-May-2013 (00:01 NY) to 28-May-2013 (23:50 NY)

	EPS Changes			Description
	FY1	FY2	FY3	
Durata Therapeutics (DRTX.OQ) (USD)				Rating: OUTPERFORM Target: US\$15 Current Price: US\$7.19 Analyst: Jason Kantor
- New	-2.40	-2.19	-0.30	Publishing minor changes to our forecasts to reflect updates from the recent DRTX 10-Q.
- Old	-2.39	-2.14	-0.30	
- % Change	-0.5%	-2.5%	0.0%	
DTE Energy (DTE.N) (USD)				Rating: OUTPERFORM Target: US\$78 Current Price: US\$67.69 Analyst: Kevin Cole
- New	4.07	4.31	4.67	Updating model to reflect 1Q13 results and capital expenditure plan, model drivers and guidance updates from 2013 Analyst Day.
- Old	4.07	4.31	4.67	
- % Change	0.2%	-0.2%	0.0%	
Hibbett Sports (HIBB.OQ) (USD)				Rating: NEUTRAL Target: US\$54 Current Price: US\$56.7 Analyst: Seth Sigman
- New	2.72	2.94	3.40	Minor model maintenance. Adjusting quarterly estimates: Q2 from \$0.40 to \$0.41, Q3 from \$0.73 to \$0.75, and Q4 from \$0.76 to \$0.78. No changes to annual estimates.
- Old	2.72	2.94	3.40	
- % Change	0.0%	0.0%	0.0%	

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Companies Mentioned (Price as of 28-May-2013)

DTE Energy (DTE.N, \$67.69, OUTPERFORM, TP \$78.0)

Durata Therapeutics (DRTX.OQ, \$7.19, OUTPERFORM[V], TP \$15.0)

Hibbett Sports (HIBB.OQ, \$56.7, NEUTRAL, TP \$54.0)

Disclosure Appendix

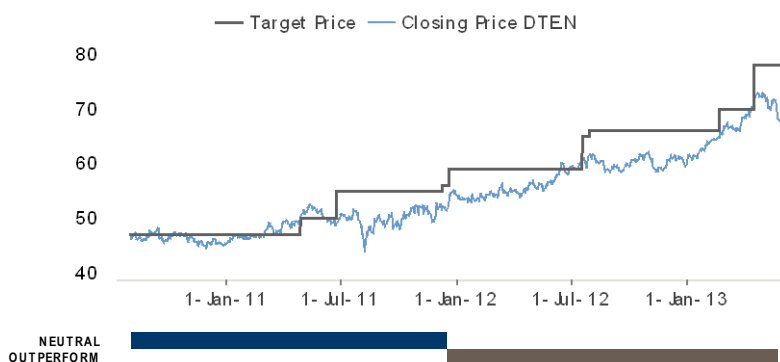
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3-Year Price and Rating History for DTE Energy (DTE.N)

DTE.N	Closing Price	Target Price	
Date	(US\$)	(US\$)	Rating
02-Aug-10	46.52	47.00	N
28-Apr-11	49.96	50.00	
24-Jun-11	49.04	55.00	
09-Dec-11	52.18	56.00	
19-Dec-11	52.23	59.00	O
18-Jul-12	60.86	65.00	
30-Jul-12	61.66	66.00	
21-Feb-13	64.83	70.00	
17-Apr-13	71.95	78.00	

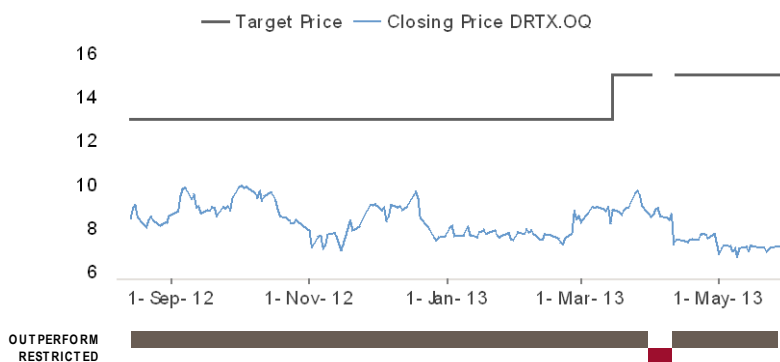
* Asterisk signifies initiation or assumption of coverage.



3-Year Price and Rating History for Durata Therapeutics (DRTX.OQ)

DRTX.OQ	Closing Price	Target Price	
Date	(US\$)	(US\$)	Rating
14-Aug-12	8.44	13.00	O *
15-Mar-13	8.85	15.00	*
01-Apr-13	8.52		R
12-Apr-13	7.49	15.00	O

* Asterisk signifies initiation or assumption of coverage.



3-Year Price and Rating History for Hibbett Sports (HIBB.OQ)

HIBB.OQ	Closing Price	Target Price	
Date	(US\$)	(US\$)	Rating
10-Oct-11	37.06	39.00	N *
21-Nov-11	44.40	44.00	
09-Mar-12	51.49	50.00	
18-May-12	54.94	61.00	
15-Mar-13	55.47	54.00	

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Neutral/Hold*	39%	(47% banking clients)
Underperform/Sell*	15%	(38% banking clients)
Restricted	3%	

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Price Target: (12 months) for Durata Therapeutics (DRTX.OQ)

Method: Our \$15 TP for DRTX is derived from a revenue multiple analysis of dalbavancin revenues by applying a 2.75 multiple to our 2017 revenue forecast of \$235M, discounted back at 12%.

Risk: Key risk factors to our \$15 TP include: 1) dalbavancin is not approved or the launch is significantly delayed, 2) dalbavancin launch ramp and/or peak sales underperforms our estimates, and 3) dalbavancin is not broadly adopted for other MRSA indications.

Price Target: (12 months) for DTE Energy (DTE.N)

Method: Our \$78.00 target price on DTE Energy is based on a combination of comparable group multiples plus 2.5% large cap premium, backstopped with tradition group 16x 2013 price-to-earnings. The comparable group multiple methodology consist of: (a) 2016 EPS used as a baseline (b) applying a group multiple to the 2016 estimate and grow shares with the dividend multiplier (c) reinvestment of the dividend each year to capture the compounding multiplier effect on ownership interest, and (d) finally discounting back the future value to 2013 to derive a price target.(see "A Thought...Evolution-igin Regulated Utility Valuation, 6/24/11" and "Could 17x be the new 12.5x, 12/12/11" for a more detailed methodology description)

Risk: Risks to our \$78 target price on DTE Energy's shares are (1) negative changes in the regulatory environment and political landscape in Michigan, (2) execution of the company's capital plans, (3) the impact of weather on gas and electric utilities, (4) trading volatility, (5) REF placements, and (6) access to capital markets to fund future growth prospects.

Price Target: (12 months) for Hibbett Sports (HIBB.OQ)

Method: Our \$54 price target on HIBB reflects 16x our FY15 EPS estimate of \$2.94 a multiple reflective of this company's growth potential and in line with other high quality growth peers.

Risk: Investing in hardlines retail stocks entails certain risks: changes in consumer spending and its components, retail industry competition, and general market risk. Specific risks to HIBB's achievement of our \$54 target price are increased competition in the sporting goods segment and lower pricing from competitors (including the discount store segment) to gain market share.

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See the Companies Mentioned section for full company names

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