

Best Ideas

Interactive web-based models are available for our Best Ideas at [Trefis](#).

Company and Industry	Morningstar Rating	Fair Value Estimate	Current Price	Uncertainty Rating	Moat Rating	Price / Fair Value	Market Cap (B)	Analyst
Basic Materials								
Cameco (CCJ)	★★★★★	\$17	\$9.98	High	Narrow	0.59	3.81	Inton
Compass Minerals International (CMP)	★★★★	\$82	\$63.75	High	Wide	0.78	2.16	Goldstein
Communication Services								
BT Group (BT.A)	★★★★	GBX 370	GBX 232.25	High	Narrow	0.63	23.04	C. Nichols
China Mobile (941)	★★★★★	HKD 102	HKD 71.55	Medium	Narrow	0.70	1465.02	Baker
Telefonica (TEF)	★★★★	\$13	\$8.14	High	Narrow	0.63	42.26	C. Nichols
Telstra (TLS)	★★★★	AUD 4.6	AUD 3.1	Medium	Narrow	0.67	36.87	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$159	\$116.39	Medium	Narrow	0.73	8.61	Akbari
Bapcor (BAP)	★★★★	AUD 7	AUD 5.66	Medium	Narrow	0.81	1.58	Ragonese
Bayerische Motoren Werke (BMW)	★★★★	EUR 110	EUR 88.7	High	Narrow	0.81	57.71	Hilgert
Domino's Pizza Enterprises (DMP)	★★★★	AUD 53	AUD 40.63	Medium	Narrow	0.77	3.47	Faul
General Motors (GM)	★★★★	\$56	\$38	High	None	0.68	53.22	Whiston
Great Wall Motor (2333)	★★★★★	HKD 13.5	HKD 7.75	High	None	0.57	109.04	Hu
Hanesbrands (HBI)	★★★★★	\$29	\$19.22	Medium	Narrow	0.66	6.93	Weishaar
Mattel (MAT)	★★★★	\$21.5	\$13.24	High	Narrow	0.62	4.55	Katz
TripAdvisor (TRIP)	★★★★	\$55	\$41.37	High	Narrow	0.75	5.75	Wasiolek
Walt Disney (DIS)	★★★★	\$130	\$102.11	Medium	Wide	0.79	153.54	Macker
Williams-Sonoma (WSM)	★★★★	\$68	\$51.98	Medium	Narrow	0.76	4.33	Katz
WPP (WPP)	★★★★	GBX 1500	GBX 1138.5	Medium	Narrow	0.76	14.41	Mogharabi
Consumer Defensive								
General Mills (GIS)	★★★★★	\$59	\$45.43	Low	Wide	0.77	25.90	Vora
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2529.5	Low	Wide	0.65	24.12	Gorham
Kao (4452)	★★★★	JPY 8800	JPY 8315	Low	Wide	0.94	4097.42	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$42.2	Medium	Wide	0.83	62.59	Lash
Procter & Gamble (PG)	★★★★	\$98	\$78.8	Low	Wide	0.80	198.66	Lash
Reckitt Benckiser Group (RB.)	★★★★	GBX 7400	GBX 6202	Low	Wide	0.84	43.69	Gorham
Energy								
Cenovus Energy (CVE)	★★★★	\$21	\$12.11	Very High	None	0.58	14.88	Gemino
Enbridge (ENB)	★★★★★	\$62	\$40.18	Medium	Wide	0.65	68.11	Gemino
Enterprise Products Partners (EPD)	★★★★	\$30	\$24.42	Low	Wide	0.81	52.77	Ellis
Royal Dutch Shell (RDS.B)	★★★★	\$78	\$67.78	Low	None	0.87	265.68	Good
Total (TOT)	★★★★	\$74	\$59.7	Medium	None	0.81	151.82	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$54.55	Medium	None	0.72	49.26	Horn
Assicurazioni Generali (G)	★★★	EUR 17.7	EUR 15.79	Very High	None	0.89	24.66	Heathfield
Capital One Financial (COF)	★★★★	\$120	\$97.52	Medium	Narrow	0.81	47.41	Plunkett
Credit Suisse Group (CSGN)	★★★★	CHF 22	CHF 15.67	High	Narrow	0.71	39.96	Scholtz
Invesco (IVZ)	★★★★	\$42	\$31.78	Medium	Narrow	0.76	13.06	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 692.8	Medium	None	0.79	9119.21	Kumagai
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 9.49	High	Narrow	0.73	12.90	Ellis
Westpac Banking (WBC)	★★★★	AUD 35	AUD 29.05	Medium	Wide	0.83	98.37	Ellis

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$165.13	Medium	Wide	0.63	54.09	Waterhouse
Healthscope (HSO)	★★★★	AUD 2.4	AUD 1.9	Medium	Narrow	0.79	3.31	Kallos
McKesson (MCK)	★★★★★	\$210	\$142.61	Medium	Wide	0.68	29.43	Lekraj
Medtronic (MDT)	★★★★	\$105	\$79.7	Medium	Wide	0.76	108.02	Wang
Ramsay Health Care (RHC)	★★★★	AUD 82	AUD 61.86	Medium	Narrow	0.75	12.50	Kallos
Roche Holding (ROG)	★★★★★	CHF 321	CHF 217.2	Low	Wide	0.68	185.87	Andersen
Shire (SHP)	★★★★	GBX 4890	GBX 3707	Medium	Narrow	0.76	33.80	Andersen
Industrials								
Anixter International (AXE)	★★★★	\$107	\$76.5	Medium	Narrow	0.71	2.55	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 41.5	Medium	Narrow	0.72	52.38	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.83	Medium	Wide	0.88	15.64	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 124	HKD 91.5	Medium	None	0.74	352.98	Tan
Fluor (FLR)	★★★★	\$69	\$58.54	High	Narrow	0.85	8.19	Silver
G4S (GFS)	★★★★	GBX 337	GBX 250.7	Medium	None	0.74	3.89	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 34.53	Medium	Wide	0.73	6.28	Molina
Grupo Aeroportuario del Pacifico SAB de CV (GAP B)	★★★★	MXN 225	MXN 189.28	High	Wide	0.84	106.19	Higgins
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 4.39	High	None	0.65	37.88	Song
Johnson Controls International (JCI)	★★★★	\$53	\$34.6	High	Narrow	0.65	32.04	Bernard
KION GROUP (KGX)	★★★★	EUR 86	EUR 77.18	Medium	Narrow	0.90	9.10	Molina
Royal Philips (PHIA)	★★★★	EUR 40	EUR 31.52	Medium	Narrow	0.79	29.20	Vonk
Sodexo (SW)	★★★★	EUR 110	EUR 79.36	Medium	Narrow	0.72	11.79	Field
Stericycle (SRCL)	★★★★	\$99	\$58.57	Very High	Wide	0.59	5.01	Schoonmaker
Real Estate								
AVEO Group (AOG)	★★★★	AUD 3.1	AUD 2.63	Medium	None	0.85	1.53	Sherlock
Sun Hung Kai Properties (16)	★★★★	HKD 153	HKD 124.9	Medium	Narrow	0.82	361.83	Zhong
Vornado Realty Trust (VNO)	★★★★	\$84	\$67.77	Medium	None	0.81	12.88	Schwer
Technology								
Guidewire Software (GWRE)	★★★★	\$100	\$81.25	Medium	Wide	NA	6.49	Nelson
KLA-Tencor (KLAC)	★★★	\$125	\$108.71	High	Wide	0.87	16.94	Davuluri
MYOB Group (MYO)	★★★★	AUD 4.05	AUD 3.05	Medium	Narrow	0.75	1.84	James
Qualcomm (QCOM)	★★★★	\$75	\$55.04	High	Narrow	0.73	81.48	Davuluri
Sabre (SABR)	★★★★	\$26	\$20.73	Medium	Narrow	0.80	5.69	Wasiolek
Salesforce.com (CRM)	★★★★	\$145	\$119.04	Medium	Wide	0.82	87.25	Nelson
Synaptics (SYNA)	★★★★	\$64	\$44.61	Very High	None	0.70	1.54	Davuluri
TDK (6762)	★★★★	JPY 11500	JPY 9280	High	None	0.81	1171.13	Ito
Tencent Holdings (700)	★★★★	HKD 641	HKD 405.8	High	Wide	0.63	3856.40	Tam
Utilities								
Contact Energy (CEN)	★★★★	NZD 6.2	NZD 5.26	Medium	Narrow	0.85	3.77	Atkins
Dominion Energy (D)	★★★★	\$84	\$67.34	Low	Wide	0.80	43.94	Fishman
FirstEnergy (FE)	★★★★	\$40	\$34.35	Low	Narrow	0.86	16.38	Fishman
Gas Natural SDG (GAS)	★★★	EUR 21	EUR 19.67	Medium	Narrow	0.94	19.67	Fulop
SCANA (SCG)	★★★★★	\$60	\$38.69	Medium	Narrow	0.64	5.52	Miller