

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	\$11.44	High	Narrow	0.67	4.55	Inton
Compass Minerals International (CMP)	★★★★	\$83	\$69.2	High	Wide	0.83	2.34	Goldstein
Martin Marietta Materials (MLM)	★★★★	\$265	\$213.51	High	Narrow	0.81	13.44	Inton
Communication Services								
BT Group (BT.A)	★★★★★	GBX 360	GBX 204.65	High	Narrow	0.57	20.31	C. Nichols
China Mobile (941)	★★★★	HKD 102	HKD 73.4	Medium	Narrow	0.72	1502.90	Baker
Telefonica (TEF)	★★★★	\$13	\$7.97	High	Narrow	0.61	41.38	C. Nichols
Telstra (TLS)	★★★★★	AUD 4.4	AUD 2.85	Medium	Narrow	0.65	33.90	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$159	\$119.79	Medium	Narrow	0.75	8.87	Akbari
Bapcor (BAP)	★★★	AUD 7	AUD 6.5	Medium	Narrow	0.93	1.82	Ragonese
Bayerische Motoren Werke (BMW)	★★★★	EUR 117	EUR 93.3	High	Narrow	0.80	60.70	Hilgert
Domino's Pizza Enterprises (DMP)	★★★★	AUD 53	AUD 42.99	Medium	Narrow	0.81	3.77	Faul
General Motors (GM)	★★★★	\$56	\$38.3	High	None	0.68	53.98	Whiston
Great Wall Motor (2333)	★★★★★	HKD 13.5	HKD 7.82	High	None	0.58	106.00	Hu
Hanesbrands (HBI)	★★★★★	\$29	\$18.14	Medium	Narrow	0.63	6.54	Hottovy
Mattel (MAT)	★★★★	\$21.5	\$15.28	High	Narrow	0.71	5.26	Katz
TripAdvisor (TRIP)	★★★★	\$56	\$48.85	High	Narrow	0.87	6.71	Wasiolek
Walt Disney (DIS)	★★★★	\$130	\$104.34	Medium	Wide	0.80	155.52	Macker
Williams-Sonoma (WSM)	★★★★	\$68	\$48.79	Medium	Narrow	0.72	4.06	Katz
WPP (WPP)	★★★★	GBX 1500	GBX 1324	Medium	Narrow	0.88	16.74	Mogharabi
Consumer Defensive								
G8 Education (GEM)	★★★★	AUD 4	AUD 2.6	High	None	0.65	1.18	James
General Mills (GIS)	★★★★★	\$59	\$42.81	Low	Wide	0.73	24.41	Vora
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2757.5	Low	Wide	0.71	26.30	Gorham
Kao (4452)	★★★★	JPY 8800	JPY 7823	Low	Wide	0.89	3861.72	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$39.52	Medium	Wide	0.77	58.29	Lash
Procter & Gamble (PG)	★★★★★	\$98	\$73.96	Low	Wide	0.75	185.98	Lash
Reckitt Benckiser Group (RB.)	★★★★★	GBX 7300	GBX 5903	Low	Wide	0.81	41.59	Gorham
Energy								
Cenovus Energy (CVE)	★★★★	\$21	\$14.32	Very High	None	0.68	17.60	Gemino
Enbridge (ENB)	★★★★★	\$64	\$42.19	Medium	Wide	0.66	71.92	Gemino
Enterprise Products Partners (EPD)	★★★★	\$31	\$28.13	Low	Wide	0.91	61.12	Ellis
Royal Dutch Shell (RDS.B)	★★★★	\$78	\$76.2	Low	None	0.98	317.85	Good
Total (TOT)	★★★★	\$74	\$63.99	Medium	None	0.86	166.21	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$54.79	Medium	None	0.72	49.18	Horn
Capital One Financial (COF)	★★★★	\$126	\$96.74	Medium	Narrow	0.77	47.06	Plunkett
Credit Suisse Group (CSGN)	★★★★	CHF 22	CHF 16.65	High	Narrow	0.76	42.28	Scholtz
Invesco (IVZ)	★★★★	\$40	\$28.65	Medium	Narrow	0.72	11.77	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 723.5	Medium	None	0.82	9523.31	Wu
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 10.46	High	Narrow	0.80	14.20	Ellis
Westpac Banking (WBC)	★★★★	AUD 35	AUD 28.85	Medium	Wide	0.82	97.69	Ellis

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$160.23	Medium	Wide	0.61	54.33	Waterhouse
McKesson (MCK)	★★★★	\$210	\$150.99	Medium	Wide	0.72	31.16	Lekraj
Medtronic (MDT)	★★★★	\$105	\$85.11	Medium	Wide	0.81	115.36	Wang
Ramsay Health Care (RHC)	★★★★	AUD 82	AUD 63.81	Medium	Narrow	0.78	12.89	Kallos
Roche Holding (ROG)	★★★★★	CHF 325	CHF 224.55	Low	Wide	0.69	192.48	Andersen
Shire (SHP)	★★★★	GBX 4890	GBX 4218	Medium	Narrow	0.86	38.55	Andersen
Industrials								
Anixter International (AXE)	★★★★★	\$107	\$61.9	Medium	Narrow	0.58	2.07	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 43.25	Medium	Narrow	0.75	54.58	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.24	Medium	Wide	0.83	14.70	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 124	HKD 88.75	Medium	None	0.72	342.37	Tan
Fluor (FLR)	★★★★	\$65	\$49.78	High	Narrow	0.77	7.00	Schoonmaker
G4S (GFS)	★★★★	GBX 337	GBX 266	Medium	None	0.79	4.13	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 32.71	Medium	Wide	0.70	5.90	Molina
Grupo Aeroportuario del Pacifico (GAP B)	★★★★	MXN 225	MXN 174.33	High	Wide	0.77	97.80	Higgins
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 4.56	High	None	0.67	38.42	Song
Johnson Controls International (JCI)	★★★★	\$53	\$36.51	High	Narrow	0.69	33.82	Bernard
KION GROUP (KGX)	★★★★	EUR 86	EUR 71.62	Medium	Narrow	0.83	8.45	Molina
Royal Philips (PHIA)	★★★★	EUR 42	EUR 36.41	Medium	Narrow	0.87	33.31	Vonk
Sodexo (SW)	★★★★	EUR 110	EUR 82.9	Medium	Narrow	0.75	12.29	Field
Stericycle (SRCL)	★★★★	\$86	\$63.82	High	Narrow	0.74	5.46	Young
Real Estate								
AVEO Group (AOG)	★★★★	AUD 3.1	AUD 2.67	Medium	None	0.86	1.55	Sherlock
Sun Hung Kai Properties (16)	★★★★	HKD 153	HKD 127.4	Medium	Narrow	0.83	369.08	Zhong
Vornado Realty Trust (VNO)	★★★★	\$84	\$66.25	Medium	None	0.79	12.60	Schwer
Welltower (WELL)	★★★★	\$74	\$53.93	High	None	NA	20.06	Brown
Technology								
Guidewire Software (GWRE)	★★★★	\$100	\$92.81	Medium	Wide	0.93	7.42	Nelson
Intel (INTC)	★★★★	\$62	\$54.81	Medium	Wide	0.88	255.41	Davuluri
KLA-Tencor (KLAC)	★★★	\$125	\$113.24	High	Wide	0.91	17.65	Davuluri
Microchip Technology (MCHP)	★★★★	\$112	\$93.37	Medium	Wide	0.83	21.88	Colello
Microsoft (MSFT)	★★★★	\$117	\$96.18	Medium	Wide	0.82	738.97	Nelson
MYOB Group (MYO)	★★★★	AUD 4.05	AUD 3.1	Medium	Narrow	0.77	1.86	James
Qualcomm (QCOM)	★★★★	\$75	\$56.95	High	Narrow	0.76	84.44	Davuluri
Sabre (SABR)	★★★★	\$27	\$23.7	Medium	Narrow	0.88	6.54	Wasiolek
Salesforce.com (CRM)	★★★★	\$145	\$126.05	Medium	Wide	0.87	93.64	Nelson
Synaptics (SYNA)	★★★★	\$64	\$42.85	Very High	None	0.67	1.48	Davuluri
TDK (6762)	★★★	JPY 11500	JPY 10410	High	None	0.91	1313.74	Ito
Tencent Holdings (700)	★★★★	HKD 641	HKD 411	High	Wide	0.64	3905.81	Tam
Utilities								
Contact Energy (CEN)	★★★★	NZD 6.2	NZD 5.63	Medium	Narrow	0.91	4.03	Atkins
Dominion Energy (D)	★★★★★	\$84	\$63.68	Low	Wide	0.76	41.55	Fishman
FirstEnergy (FE)	★★★★	\$40	\$33.25	Low	Narrow	0.83	15.86	Fishman
Gas Natural SDG (GAS)	★★★	EUR 23.5	EUR 22.41	Medium	Narrow	0.95	22.41	Fulop
SCANA (SCG)	★★★★★	\$57	\$34.02	Medium	Narrow	0.60	4.85	Miller