

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	\$12.1	High	Narrow	0.71	4.75	Inton
Compass Minerals International (CMP)	★★★★	\$83	\$69.45	High	Wide	0.84	2.35	Goldstein
Martin Marietta Materials (MLM)	★★★★	\$265	\$230.2	High	Narrow	0.87	14.49	Inton
Communication Services								
BT Group (BT.A)	★★★★★	GBX 360	GBX 214.1	High	Narrow	0.59	21.24	C. Nichols
China Mobile (941)	★★★★	HKD 102	HKD 70.25	Medium	Narrow	0.69	1438.40	Baker
Telefonica (TEF)	★★★★★	\$13	\$7.44	High	Narrow	0.57	38.67	C. Nichols
Telstra (TLS)	★★★★★	AUD 4.4	AUD 2.94	Medium	Narrow	0.67	34.97	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$157	\$133.5	Medium	Narrow	0.85	9.88	Akbari
Bayerische Motoren Werke (BMW)	★★★★	EUR 117	EUR 86.27	High	Narrow	0.74	56.07	Hilgert
Domino's Pizza Enterprises (DMP)	★★★	AUD 53	AUD 52.24	Medium	Narrow	0.99	4.58	Faul
Expedia Group (EXPE)	★★★★	\$180	\$123.58	High	Narrow	0.69	18.56	Wasiolek
General Motors (GM)	★★★★	\$56	\$43.57	High	None	0.78	61.41	Whiston
Great Wall Motor (2333)	★★★★★	HKD 13.5	HKD 7	High	None	0.52	99.26	Hu
Hanesbrands (HBI)	★★★★★	\$29	\$20.17	Medium	Narrow	0.70	7.27	Hottovy
InvoCare (IVC)	★★★★	AUD 15.5	AUD 13.42	Medium	Wide	0.87	1.48	Ragonese
Mattel (MAT)	★★★★	\$21.5	\$17.92	High	Narrow	0.83	6.16	Katz
Walt Disney (DIS)	★★★★	\$130	\$108.75	Medium	Wide	0.84	161.68	Macker
Williams-Sonoma (WSM)	★★★★	\$68	\$60.85	Medium	Narrow	0.89	5.06	Katz
WPP (WPP)	★★★★	GBX 1500	GBX 1230	Medium	Narrow	0.82	15.52	Mogharabi
Consumer Defensive								
G8 Education (GEM)	★★★★	AUD 4	AUD 2.38	High	None	0.60	1.08	James
General Mills (GIS)	★★★★★	\$59	\$44.51	Low	Wide	0.75	25.38	Vora
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2608	Low	Wide	0.67	24.87	Gorham
Kao (4452)	★★★	JPY 8800	JPY 8647	Low	Wide	0.98	4226.81	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$40.4	Medium	Wide	0.79	59.59	Lash
PepsiCo (PEP)	★★★★	\$123	\$105.13	Low	Wide	0.85	149.06	Vora
Procter & Gamble (PG)	★★★★★	\$98	\$75.99	Low	Wide	0.78	191.08	Lash
Reckitt Benckiser Group (RB.)	★★★★	GBX 7300	GBX 6150	Low	Wide	0.84	43.42	Gorham
Energy								
Cenovus Energy (CVE)	★★★★	\$21	\$12.38	Very High	None	0.59	15.21	Gemino
Enbridge (ENB)	★★★★★	\$64	\$42.69	Medium	Wide	0.67	72.78	Gemino
Enterprise Products Partners (EPD)	★★★★	\$31	\$28.81	Low	Wide	0.93	62.59	Ellis
Royal Dutch Shell (RDS.B)	★★★★	\$78	\$72.94	Low	None	0.94	292.00	Good
Total (TOT)	★★★★	\$74	\$61.2	Medium	None	0.83	161.32	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$54.8	Medium	None	0.72	49.19	Horn
Capital One Financial (COF)	★★★★	\$123	\$96.28	Medium	Narrow	0.78	46.83	Plunkett
Credit Suisse Group (CSGN)	★★★★	CHF 22	CHF 15.36	High	Narrow	0.70	39.01	Scholtz
Invesco (IVZ)	★★★★	\$40	\$27.21	Medium	Narrow	0.68	11.18	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 658.7	Medium	None	0.75	8651.90	Wu
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 9.38	High	Narrow	0.72	12.72	Ellis
Westpac Banking (WBC)	★★★★	AUD 35	AUD 27.9	Medium	Wide	0.80	94.47	Ellis

Source: Morningstar. As of June 15, 2018

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$173.95	Medium	Wide	0.66	58.98	Waterhouse
McKesson (MCK)	★★★★	\$210	\$150	Medium	Wide	0.71	30.31	Lekraj
Medtronic (MDT)	★★★★	\$105	\$86.57	Medium	Wide	0.82	117.23	Wang
Ramsay Health Care (RHC)	★★★★	AUD 82	AUD 58.94	Medium	Narrow	0.72	11.91	Kallos
Roche Holding (ROG)	★★★★★	CHF 325	CHF 211.85	Low	Wide	0.65	181.39	Andersen
Shire (SHP)	★★★★	GBX 4890	GBX 4069.5	Medium	Narrow	0.83	37.19	Andersen
Industrials								
Allegion (ALLE)	★★★★	\$91	\$81.79	Medium	Wide	0.90	7.77	Bernard
Anixter International (AXE)	★★★★★	\$107	\$66	Medium	Narrow	0.62	2.21	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 42.35	Medium	Narrow	0.73	53.45	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.19	Medium	Wide	0.82	14.62	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 124	HKD 88.5	Medium	None	0.71	341.40	Tan
G4S (GFS)	★★★★	GBX 337	GBX 279.5	Medium	None	0.83	4.34	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 32.03	Medium	Wide	0.68	5.78	Molina
Grupo Aeroportuario del Pacifico (GAP B)	★★★★	MXN 216	MXN 181.93	High	Wide	0.84	102.06	Higgins
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 4.43	High	None	0.65	37.54	Song
Johnson Controls International (JCI)	★★★★	\$53	\$34.89	High	Narrow	0.66	32.32	Bernard
KION GROUP (KGX)	★★★★	EUR 90	EUR 72.52	Medium	Narrow	0.81	8.55	Molina
Royal Philips (PHIA)	★★★★	EUR 42	EUR 36.95	Medium	Narrow	0.88	35.12	Vonk
Sodexo (SW)	★★★★	EUR 110	EUR 85.72	Medium	Narrow	0.78	12.71	Field
Stericycle (SRCL)	★★★★	\$86	\$64.21	High	Narrow	0.75	5.49	Young
Real Estate								
AVEO Group (AOG)	★★★★	AUD 3.1	AUD 2.35	Medium	None	0.76	1.36	Sherlock
Sun Hung Kai Properties (16)	★★★★	HKD 153	HKD 123.3	Medium	Narrow	0.81	357.20	Zhong
Welltower (WELL)	★★★★	\$74	\$57.64	High	None	NA	21.44	Brown
Technology								
Intel (INTC)	★★★★	\$62	\$55.54	Medium	Wide	0.90	258.82	Davuluri
KLA-Tencor (KLAC)	★★★	\$125	\$113.13	High	Wide	0.91	17.60	Davuluri
Microchip Technology (MCHP)	★★★★	\$112	\$102.57	Medium	Wide	0.92	24.11	Colello
Microsoft (MSFT)	★★★★	\$122	\$101.42	Medium	Wide	0.83	779.23	Nelson
MYOB Group (MYO)	★★★★	AUD 3.82	AUD 2.81	Medium	Narrow	0.74	1.68	James
Qualcomm (QCOM)	★★★★	\$75	\$59.46	High	Narrow	0.79	88.17	Davuluri
Salesforce.com (CRM)	★★★★	\$158	\$138.41	Medium	Wide	0.88	102.83	Nelson
Synaptics (SYNA)	★★★★	\$64	\$48.09	Very High	None	0.75	1.66	Davuluri
TDK (6762)	★★★	JPY 11500	JPY 11490	High	None	1.00	1450.04	Ito
Tencent Holdings (700)	★★★★	HKD 641	HKD 410	High	Wide	0.64	3896.31	Tam
Utilities								
Dominion Energy (D)	★★★★★	\$84	\$65.52	Low	Wide	0.78	42.77	Fishman
FirstEnergy (FE)	★★★★	\$40	\$34.27	Low	Narrow	0.86	16.34	Fishman
Gas Natural SDG (GAS)	★★★	EUR 23.5	EUR 21.87	Medium	Narrow	0.93	21.87	Fulop
SCANA (SCG)	★★★★★	\$57	\$36.9	Medium	Narrow	0.65	5.26	Miller