

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	\$9.23	High	Narrow	0.54	3.62	Inton
Compass Minerals International (CMP)	★★★★	\$82	\$62.25	High	Wide	0.76	2.11	Goldstein
Communication Services								
BT Group (BT.A)	★★★★	GBX 370	GBX 224.95	High	Narrow	0.61	22.32	C. Nichols
China Mobile (941)	★★★★★	HKD 110	HKD 72.3	Medium	Narrow	0.66	1480.38	Baker
Telefonica (TEF)	★★★★	\$13	\$8.2	High	Narrow	0.63	42.58	C. Nichols
Telstra (TLS)	★★★★	AUD 4.6	AUD 3.35	Medium	Narrow	0.73	39.84	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$159	\$117.1	Medium	Narrow	0.74	8.66	Akbari
Bapcor (BAP)	★★★★	AUD 7	AUD 5.87	Medium	Narrow	0.84	1.64	Ragonese
Bayerische Motoren Werke (BMW)	★★★★	EUR 110	EUR 85.12	High	Narrow	0.77	55.27	Hilgert
Domino's Pizza Enterprises (DMP)	★★★★	AUD 53	AUD 43.16	Medium	Narrow	0.81	3.78	Faul
General Motors (GM)	★★★★	\$56	\$37.85	High	None	0.68	53.01	Whiston
Great Wall Motor (2333)	★★★★	HKD 14.9	HKD 8.88	High	None	0.60	119.94	Hu
Hanesbrands (HBI)	★★★★★	\$29	\$19.43	Medium	Narrow	0.67	7.00	Weishaar
Mattel (MAT)	★★★★	\$22.5	\$13.84	High	Narrow	0.62	4.76	Katz
TripAdvisor (TRIP)	★★★★	\$55	\$43.74	High	Narrow	0.80	6.08	Wasiolek
Walt Disney (DIS)	★★★★	\$130	\$103.24	Medium	Wide	0.79	155.24	Macker
Williams-Sonoma (WSM)	★★★★	\$65	\$55.03	Medium	Narrow	0.85	4.61	Katz
WPP (WPP)	★★★★	GBX 1500	GBX 1155.5	Medium	Narrow	0.77	14.65	Mogharabi
Consumer Defensive								
General Mills (GIS)	★★★★	\$61	\$50.93	Low	Wide	0.83	28.98	Vora
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2479	Low	Wide	0.64	23.64	Gorham
Kao (4452)	★★★★	JPY 8800	JPY 7650	Low	Wide	0.87	3701.55	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$43.39	Medium	Wide	0.85	64.54	Lash
Procter & Gamble (PG)	★★★★	\$98	\$78.67	Low	Wide	0.80	198.33	Lash
Reckitt Benckiser Group (RB.)	★★★★★	GBX 7400	GBX 5646	Low	Wide	0.76	39.76	Gorham
Energy								
Cenovus Energy (CVE)	★★★★★	\$21	\$10.58	Very High	None	0.50	13.00	Gemino
Enbridge (ENB)	★★★★★	\$64	\$41.06	Medium	Wide	0.64	69.60	Gemino
Royal Dutch Shell (RDS.B)	★★★★	\$76	\$63	Low	None	0.83	257.03	Good
RSP Permian (RSPP)	★★★★	\$55	\$38.8	High	None	0.71	6.19	Meats
Total (TOT)	★★★★	\$70	\$57.23	Medium	None	0.82	152.03	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$54.66	Medium	None	0.72	49.33	Horn
Assicurazioni Generali (G)	★★★	EUR 17.7	EUR 15.7	Very High	None	0.89	24.52	Heathfield
Capital One Financial (COF)	★★★★	\$120	\$98.05	Medium	Narrow	0.82	47.68	Plunkett
Invesco (IVZ)	★★★★	\$42	\$32.92	Medium	Narrow	0.78	13.40	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 717	Medium	None	0.81	9437.75	Kumagai
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 9.77	High	Narrow	0.75	13.28	Ellis
Westpac Banking (WBC)	★★★★	AUD 35	AUD 29.52	Medium	Wide	0.84	99.96	Ellis

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$166.12	Medium	Wide	0.63	54.42	Waterhouse
Express Scripts Holding (ESRX)	★★★★	\$92	\$76.33	Medium	Wide	0.83	42.84	Lekraj
Healthscope (HSO)	★★★★	AUD 2.4	AUD 1.96	Medium	Narrow	0.82	3.42	Kallos
McKesson (MCK)	★★★★	\$210	\$153.96	Medium	Wide	0.73	31.77	Lekraj
Ramsay Health Care (RHC)	★★★★	AUD 82	AUD 63	Medium	Narrow	0.77	12.73	Kallos
Roche Holding (ROG)	★★★★★	CHF 321	CHF 220.05	Low	Wide	0.69	187.85	Andersen
Shire (SHP)	★★★★★	GBX 4890	GBX 3159	Medium	Narrow	0.65	28.77	Andersen
Industrials								
Anixter International (AXE)	★★★★	\$107	\$78.3	Medium	Narrow	0.73	2.61	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 43.4	Medium	Narrow	0.75	54.77	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.67	Medium	Wide	0.86	15.39	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 120	HKD 98.9	Medium	None	0.82	381.52	Tan
Fluor (FLR)	★★★★	\$69	\$57.31	High	Narrow	0.83	8.02	Silver
G4S (GFS)	★★★★	GBX 337	GBX 251	Medium	None	0.74	3.89	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 35.55	Medium	Wide	0.76	6.46	Molina
Grupo Aeroportuario del Pacifico SAB de CV (GAP B)	★★★★	MXN 225	MXN 183.53	High	Wide	0.82	102.96	Higgins
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 5.05	High	None	0.74	41.33	Song
Johnson Controls International (JCI)	★★★★	\$53	\$37.05	High	Narrow	0.70	34.31	Bernard
KION GROUP (KGX)	★★★★	EUR 86	EUR 74.5	Medium	Narrow	0.87	8.79	Molina
Royal Philips (PHIA)	★★★★	EUR 40	EUR 31.75	Medium	Narrow	0.79	29.41	Vonk
Stericycle (SRCL)	★★★★	\$99	\$63.31	Very High	Wide	0.64	5.42	Schoonmaker
Real Estate								
AVEO Group (AOG)	★★★★	AUD 3.1	AUD 2.65	Medium	None	0.85	1.54	Sherlock
Sun Hung Kai Properties (16)	★★★★	HKD 153	HKD 129.8	Medium	Narrow	0.85	376.03	Zhong
Vornado Realty Trust (VNO)	★★★★	\$84	\$68.62	Medium	None	0.82	13.04	Schwer
Technology								
Guidewire Software (GWRE)	★★★★	\$100	\$85.6	Medium	Wide	0.86	6.84	Nelson
KLA-Tencor (KLAC)	★★★	\$125	\$120.81	High	Wide	0.97	18.92	Davuluri
LM Ericsson Telephone (ERIC B)	★★★	SEK 61	SEK 56.16	Very High	None	NA	184.77	Colello
MYOB Group (MYO)	★★★★	AUD 4.05	AUD 3.18	Medium	Narrow	0.79	1.92	James
Qualcomm (QCOM)	★★★★	\$75	\$59.89	High	Narrow	0.80	88.66	Davuluri
Sabre (SABR)	★★★★	\$26	\$22.03	Medium	Narrow	0.85	6.05	Wasiolek
Salesforce.com (CRM)	★★★★	\$145	\$127.22	Medium	Wide	0.88	93.06	Nelson
Synaptics (SYNA)	★★★★	\$64	\$47.96	Very High	None	0.75	1.65	Davuluri
TDK (6762)	★★★	JPY 11500	JPY 10060	High	None	0.87	1269.57	Ito
Tencent Holdings (700)	★★★	HKD 492	HKD 465.2	High	Wide	0.95	4418.76	Tam
Utilities								
Contact Energy (CEN)	★★★★	NZD 6.2	NZD 5.28	Medium	Narrow	0.85	3.78	Atkins
Dominion Energy (D)	★★★★	\$87	\$71.24	Low	Wide	0.82	46.41	Fishman
FirstEnergy (FE)	★★★★	\$40	\$33.68	Low	Narrow	0.84	16.02	Fishman
Gas Natural SDG (GAS)	★★★★	EUR 21	EUR 18.83	Medium	Narrow	0.90	18.83	Fulop
SCANA (SCG)	★★★★★	\$60	\$40.38	Medium	Narrow	0.67	5.76	Miller