

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	\$8.94	High	Narrow	0.53	3.51	Inton
Compass Minerals International (CMP)	★★★★	\$82	\$58.9	High	Wide	0.72	1.99	Goldstein
Communication Services								
BT Group (BT.A)	★★★★	GBX 370	GBX 240	High	Narrow	0.65	23.81	C. Nichols
China Mobile (941)	★★★★★	HKD 110	HKD 72.6	Medium	Narrow	0.66	1486.52	Baker
Telefonica (TEF)	★★★★	\$13	\$7.83	High	Narrow	0.60	40.66	C. Nichols
Telstra (TLS)	★★★★	AUD 4.6	AUD 3.27	Medium	Narrow	0.71	38.89	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$155	\$117.51	Medium	Narrow	0.76	8.69	Akbari
Bapcor (BAP)	★★★★	AUD 7	AUD 5.8	Medium	Narrow	0.83	1.62	Ragonese
Bayerische Motoren Werke (BMW)	★★★★	EUR 110	EUR 85.3	High	Narrow	0.78	55.41	Hilgert
Domino's Pizza Enterprises (DMP)	★★★★	AUD 53	AUD 39.8	Medium	Narrow	0.75	3.49	Faul
General Motors (GM)	★★★★	\$56	\$37.79	High	None	0.67	53.02	Whiston
Great Wall Motor (2333)	★★★★	HKD 14.9	HKD 9.09	High	None	0.61	123.46	Hu
Hanesbrands (HBI)	★★★★★	\$32	\$19.51	Medium	Narrow	0.61	7.03	Weishaar
Mattel (MAT)	★★★★	\$22.5	\$15.85	High	Narrow	0.70	5.45	Katz
TripAdvisor (TRIP)	★★★★	\$55	\$39.76	High	Narrow	0.72	5.53	Wasiolek
Walt Disney (DIS)	★★★★	\$130	\$102.57	Medium	Wide	0.79	154.23	Macker
Williams-Sonoma (WSM)	★★★★	\$65	\$51.96	Medium	Narrow	0.80	4.37	Katz
WPP (WPP)	★★★★	GBX 1500	GBX 1280	Medium	Narrow	0.85	16.26	Mogharabi
Consumer Defensive								
General Mills (GIS)	★★★★	\$61	\$50.57	Low	Wide	0.83	28.78	Vora
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2603.5	Low	Wide	0.67	24.83	Gorham
Kao (4452)	★★★★	JPY 8800	JPY 7635	Low	Wide	0.87	3694.29	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$43.62	Medium	Wide	0.86	64.88	Lash
Procter & Gamble (PG)	★★★★	\$98	\$78.7	Low	Wide	0.80	198.40	Lash
Reckitt Benckiser Group (RB.)	★★★★	GBX 7400	GBX 5724	Low	Wide	0.77	40.31	Gorham
Energy								
Cenovus Energy (CVE)	★★★★★	\$21	\$9.4	Very High	None	0.45	11.55	Gemino
Enbridge (ENB)	★★★★★	\$64	\$40.78	Medium	Wide	0.64	69.13	Gemino
Royal Dutch Shell (RDS.B)	★★★★	\$76	\$64.16	Low	None	0.84	263.72	Good
RSP Permian (RSPP)	★★★★	\$55	\$38.97	High	None	0.71	6.21	Meats
Total (TOT)	★★★★	\$70	\$56.53	Medium	None	0.81	142.76	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$56.47	Medium	None	0.74	50.96	Horn
Assicurazioni Generali (G)	★★★	EUR 17.7	EUR 15.4	Very High	None	0.87	24.05	Heathfield
Capital One Financial (COF)	★★★★	\$120	\$96.51	Medium	Narrow	0.80	46.93	Plunkett
Invesco (IVZ)	★★★★	\$42	\$31.81	Medium	Narrow	0.76	12.95	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 736.3	Medium	None	0.84	9691.80	Kumagai
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 10.12	High	Narrow	0.78	13.76	Ellis
Westpac Banking (WBC)	★★★★	AUD 35	AUD 30.71	Medium	Wide	0.88	103.99	Ellis

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$148.19	Medium	Wide	0.56	48.95	Waterhouse
Express Scripts Holding (ESRX)	★★★★	\$89	\$74.07	Medium	Wide	0.83	41.80	Lekraj
Healthscope (HSO)	★★★★	AUD 2.4	AUD 1.83	Medium	Narrow	0.76	3.18	Kallos
McKesson (MCK)	★★★★	\$210	\$146.54	Medium	Wide	0.70	30.24	Lekraj
Ramsay Health Care (RHC)	★★★★	AUD 82	AUD 62.62	Medium	Narrow	0.76	12.65	Kallos
Roche Holding (ROG)	★★★★★	CHF 321	CHF 217.75	Low	Wide	0.68	186.51	Andersen
Shire (SHP)	★★★★★	GBX 4890	GBX 3222	Medium	Narrow	0.66	29.32	Andersen
Industrials								
Anixter International (AXE)	★★★★	\$107	\$74.9	Medium	Narrow	0.70	2.49	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 42.55	Medium	Narrow	0.73	53.70	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.44	Medium	Wide	0.84	15.02	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 120	HKD 97.4	Medium	None	0.81	375.74	Tan
Fluor (FLR)	★★★★	\$69	\$55.78	High	Narrow	0.81	7.80	Silver
G4S (GFS)	★★★★	GBX 312	GBX 256.8	Medium	None	0.82	3.98	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 38.11	Medium	Wide	0.81	6.93	Molina
Grupo Aeroportuario del Pacifico SAB de CV (GAP B)	★★★★	MXN 225	MXN 184.7	High	Wide	0.82	103.62	Higgins
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 5.02	High	None	0.74	40.23	Song
Johnson Controls International (JCI)	★★★★	\$53	\$35.9	High	Narrow	0.68	33.25	Bernard
KION GROUP (KGX)	★★★★	EUR 86	EUR 73.14	Medium	Narrow	0.85	8.61	Molina
Royal Philips (PHIA)	★★★★	EUR 40	EUR 31.35	Medium	Narrow	0.78	29.04	Vonk
Stericycle (SRCL)	★★★★	\$99	\$62.04	Very High	Wide	0.63	5.31	Schoonmaker
Real Estate								
AVEO Group (AOG)	★★★★	AUD 3.1	AUD 2.61	Medium	None	0.84	1.52	Sherlock
Sun Hung Kai Properties (16)	★★★★	HKD 153	HKD 131	Medium	Narrow	0.86	379.43	Zhong
Vornado Realty Trust (VNO)	★★★★	\$84	\$66.3	Medium	None	0.79	12.60	Schwer
Technology								
Guidewire Software (GWRE)	★★★★	\$95	\$81.03	Medium	Wide	0.85	6.22	Nelson
KLA-Tencor (KLAC)	★★★	\$125	\$111.21	High	Wide	0.89	17.42	Davuluri
LM Ericsson Telephone (ERIC B)	Under Review	Under Review	SEK 54.24	Very High	None	NA	178.26	Kundozerov
MYOB Group (MYO)	★★★★	AUD 4.05	AUD 3.1	Medium	Narrow	0.77	1.88	James
Qualcomm (QCOM)	★★★	\$75	\$64.96	High	Narrow	0.87	96.16	Davuluri
Sabre (SABR)	★★★★	\$26	\$22.7	Medium	Narrow	0.87	6.23	Wasiolek
Salesforce.com (CRM)	★★★★	\$145	\$119.43	Medium	Wide	0.82	86.26	Nelson
Synaptics (SYNA)	★★★★	\$64	\$45.51	Very High	None	0.71	1.57	Davuluri
TDK (6762)	★★★★	JPY 11500	JPY 9340	High	None	0.81	1178.71	Ito
Tencent Holdings (700)	★★★	HKD 492	HKD 436	High	Wide	0.89	4141.40	Tam
Utilities								
Contact Energy (CEN)	★★★★	NZD 6.2	NZD 5.22	Medium	Narrow	0.84	3.74	Atkins
Dominion Energy (D)	★★★★	\$87	\$72.35	Low	Wide	0.83	47.14	Fishman
FirstEnergy (FE)	★★★★	\$40	\$32.31	Low	Narrow	0.81	15.37	Fishman
Gas Natural SDG (GAS)	★★★★	EUR 21	EUR 18.29	Medium	Narrow	0.87	18.29	Fulop
SCANA (SCG)	★★★★★	\$60	\$39.76	Medium	Narrow	0.66	5.67	Miller