

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	\$9.03	High	Narrow	0.53	3.58	Inton
Compass Minerals International (CMP)	★★★★	\$82	\$61.95	High	Wide	0.76	2.10	Goldstein
Communication Services								
BT Group (BT.A)	★★★★	GBX 370	GBX 232.35	High	Narrow	0.63	23.05	C. Nichols
China Mobile (941)	★★★★★	HKD 110	HKD 74.75	Medium	Narrow	0.68	1530.54	Baker
Quebecor (QBR.B)	★★★★	CAD 27	CAD 24.07	Medium	Narrow	0.89	5.79	Zhao
Telefonica (TEF)	★★★★	\$13	\$8.02	High	Narrow	0.62	41.65	C. Nichols
Telstra (TLS)	★★★★	AUD 4.6	AUD 3.48	Medium	Narrow	0.76	41.39	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$155	\$110.49	Medium	Narrow	0.71	8.17	Akbari
Bapcor (BAP)	★★★★	AUD 7	AUD 5.86	Medium	Narrow	0.84	1.64	Ragonese
Domino's Pizza Enterprises (DMP)	★★★★	AUD 53	AUD 41.01	Medium	Narrow	0.77	3.59	Faul
General Motors (GM)	★★★★	\$56	\$40.91	High	None	0.73	57.38	Whiston
Great Wall Motor (2333)	★★★★	HKD 14.9	HKD 8.89	High	None	0.60	116.51	Hu
Hanesbrands (HBI)	★★★★★	\$32	\$20.13	Medium	Narrow	0.63	7.25	Weishaar
Mattel (MAT)	★★★★	\$22.5	\$16.64	High	Narrow	0.74	5.72	Katz
Starbucks (SBUX)	★★★★	\$68	\$55.4	Medium	Wide	0.81	77.87	Hottovy
The Interpublic Group of Companies (IPG)	★★★★	\$25	\$23.94	Medium	Narrow	0.96	9.30	Mogharabi
TripAdvisor (TRIP)	★★★★	\$55	\$41.65	High	Narrow	0.76	5.79	Wasiolek
Walt Disney (DIS)	★★★★	\$130	\$105.24	Medium	Wide	0.81	158.25	Macker
Williams-Sonoma (WSM)	★★★★	\$65	\$53.25	Medium	Narrow	0.82	4.48	Katz
WPP (WPP)	★★★★	GBX 1640	GBX 1361	Medium	Narrow	0.83	17.28	Mogharabi
Consumer Defensive								
Coca-Cola Amatil (CCL)	★★★	AUD 9.4	AUD 9.05	Medium	Narrow	0.96	6.70	Fleck
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2609.5	Low	Wide	0.67	24.89	Gorham
Kao (4452)	★★★★	JPY 8800	JPY 7730	Low	Wide	0.88	3740.26	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$43.51	Medium	Wide	0.85	64.71	Lash
Procter & Gamble (PG)	★★★★	\$98	\$80.84	Low	Wide	0.82	203.80	Lash
Energy								
Cenovus Energy (CVE)	★★★★★	\$21	\$9.31	Very High	None	0.44	11.44	Gemino
Enbridge (ENB)	★★★★★	\$64	\$42.57	Medium	Wide	0.67	72.16	Gemino
Royal Dutch Shell (RDS.B)	★★★★	\$76	\$64.47	Low	None	0.85	263.34	Good
RSP Permian (RSPP)	★★★★	\$57	\$35.7	High	None	0.63	5.66	Meats
Total (TOT)	★★★★	\$70	\$57.53	Medium	None	0.82	145.32	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$59.96	Medium	None	0.79	54.11	Horn
Assicurazioni Generali (G)	★★★	EUR 17.7	EUR 15.32	Very High	None	0.87	23.92	Heathfield
Capital One Financial (COF)	★★★★	\$120	\$96.67	Medium	Narrow	0.81	47.01	Plunkett
Invesco (IVZ)	★★★★	\$42	\$32.94	Medium	Narrow	0.78	13.41	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 765.4	Medium	None	0.87	10074.83	Kumagai
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 10.73	High	Narrow	0.83	14.59	Ellis

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$159.4	Medium	Wide	0.61	52.65	Waterhouse
Express Scripts Holding (ESRX)	★★★★	\$89	\$74.72	Medium	Wide	0.84	42.32	Lekraj
Healthscope (HSO)	★★★★	AUD 2.4	AUD 1.92	Medium	Narrow	0.80	3.34	Kallos
McKesson (MCK)	★★★★	\$210	\$150.09	Medium	Wide	0.71	30.97	Lekraj
Ramsay Health Care (RHC)	★★★★	AUD 87	AUD 68.07	Medium	Narrow	0.78	13.76	Kallos
Roche Holding (ROG)	★★★★★	CHF 321	CHF 222.05	Low	Wide	0.69	190.20	Andersen
Shire (SHP)	★★★★★	GBX 4890	GBX 3037	Medium	Narrow	0.62	27.64	Andersen
Industrials								
Anixter International (AXE)	★★★★	\$107	\$77.5	Medium	Narrow	0.72	2.58	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 43.8	Medium	Narrow	0.76	55.28	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.64	Medium	Wide	0.86	15.34	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 120	HKD 99.3	Medium	None	0.83	383.07	Tan
Fluor (FLR)	★★★★	\$69	\$58.11	High	Narrow	0.84	8.13	Silver
G4S (GFS)	★★★★	GBX 312	GBX 260.3	Medium	None	0.83	4.04	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 38.86	Medium	Wide	0.83	7.07	Molina
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 5.2	High	None	0.76	39.22	Song
Johnson Controls International (JCI)	★★★★	\$53	\$37.98	High	Narrow	0.72	35.17	Bernard
KION GROUP (KGX)	★★★★	EUR 86	EUR 71.14	Medium	Narrow	0.83	8.38	Molina
Royal Philips (PHIA)	★★★★	EUR 40	EUR 31.36	Medium	Narrow	0.78	29.05	Vonk
Stericycle (SRCL)	★★★★	\$99	\$60.63	Very High	Wide	0.61	5.18	Schoonmaker
Real Estate								
AVEO Group (AOG)	★★★★	AUD 3.1	AUD 2.66	Medium	None	0.86	1.55	Sherlock
Vornado Realty Trust (VNO)	★★★★	\$84	\$66.53	Medium	None	0.79	12.64	Schwer
Technology								
Guidewire Software (GWRE)	★★★★	\$95	\$79.89	Medium	Wide	0.84	6.13	Nelson
KLA-Tencor (KLAC)	★★★	\$125	\$108.91	High	Wide	0.87	17.06	Davuluri
MYOB Group (MYO)	★★★★	AUD 4.05	AUD 3.35	Medium	Narrow	0.83	2.03	James
Qualcomm (QCOM)	★★★	\$75	\$62.18	High	Narrow	0.83	92.05	Davuluri
Sabre (SABR)	★★★★	\$26	\$23.38	Medium	Narrow	0.90	6.42	Wasiolek
Salesforce.com (CRM)	★★★★	\$138	\$113	Medium	Wide	0.82	81.62	Nelson
Synaptics (SYNA)	★★★★	\$64	\$47.1	Very High	None	0.74	1.62	Davuluri
TDK (6762)	★★★★	JPY 11500	JPY 9650	High	None	0.84	1217.83	Ito
Tencent Holdings (700)	★★★	HKD 492	HKD 453.4	High	Wide	0.92	4306.68	Tam
Utilities								
Dominion Energy (D)	★★★★	\$87	\$73.58	Low	Wide	0.85	47.43	Fishman
FirstEnergy (FE)	★★★★★	\$40	\$32.92	Low	Narrow	0.82	15.66	Fishman
Gas Natural SDG (GAS)	★★★★	EUR 21	EUR 19.01	Medium	Narrow	0.91	19.02	Fulop
SCANA (SCG)	★★★★★	\$60	\$39.93	Medium	Narrow	0.67	5.70	Miller