

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	\$9.09	High	Narrow	0.53	3.62	Inton
Compass Minerals International (CMP)	★★★★	\$82	\$60.3	High	Wide	0.74	2.04	Goldstein
Communication Services								
BT Group (BT.A)	★★★★	GBX 370	GBX 218.85	High	Narrow	0.59	21.71	C. Nichols
China Mobile (941)	★★★★★	HKD 102	HKD 70.8	Medium	Narrow	0.69	1449.66	Baker
Telefonica (TEF)	★★★★	\$13	\$7.78	High	Narrow	0.60	40.43	C. Nichols
Telstra (TLS)	★★★★	AUD 4.6	AUD 3.22	Medium	Narrow	0.70	38.30	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$159	\$111.71	Medium	Narrow	0.70	8.26	Akbari
Bapcor (BAP)	★★★★	AUD 7	AUD 5.62	Medium	Narrow	0.80	1.57	Ragonese
Bayerische Motoren Werke (BMW)	★★★★	EUR 110	EUR 85.33	High	Narrow	0.78	55.47	Hilgert
Domino's Pizza Enterprises (DMP)	★★★★	AUD 53	AUD 41.17	Medium	Narrow	0.78	3.61	Faul
General Motors (GM)	★★★★	\$56	\$36.35	High	None	0.65	50.91	Whiston
Great Wall Motor (2333)	★★★★★	HKD 14.9	HKD 8.48	High	None	0.57	115.44	Hu
Hanesbrands (HBI)	★★★★★	\$29	\$18.59	Medium	Narrow	0.64	6.70	Weishaar
Mattel (MAT)	★★★★	\$21.5	\$12.9	High	Narrow	0.60	4.44	Katz
TripAdvisor (TRIP)	★★★★	\$55	\$40.11	High	Narrow	0.73	5.57	Wasiolek
Walt Disney (DIS)	★★★★	\$130	\$100.6	Medium	Wide	0.77	151.27	Macker
Williams-Sonoma (WSM)	★★★★	\$68	\$50.75	Medium	Narrow	0.75	4.25	Katz
WPP (WPP)	★★★★	GBX 1500	GBX 1098	Medium	Narrow	0.73	13.90	Mogharabi
Consumer Defensive								
General Mills (GIS)	★★★★★	\$59	\$44.45	Low	Wide	0.75	25.34	Vora
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2360	Low	Wide	0.61	22.51	Gorham
Kao (4452)	★★★★	JPY 8800	JPY 7274	Low	Wide	0.83	3519.61	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$41.05	Medium	Wide	0.80	61.05	Lash
Procter & Gamble (PG)	★★★★	\$98	\$76.41	Low	Wide	0.78	192.63	Lash
Reckitt Benckiser Group (RB.)	★★★★★	GBX 7400	GBX 5895	Low	Wide	0.80	41.51	Gorham
Energy								
Cenovus Energy (CVE)	★★★★	\$21	\$10.88	Very High	None	0.52	13.37	Gemino
Enbridge (ENB)	★★★★★	\$62	\$39.6	Medium	Wide	0.64	67.13	Gemino
Royal Dutch Shell (RDS.B)	★★★★	\$76	\$63.85	Low	None	0.84	261.21	Good
RSP Permian (RSPP)	★★★★	\$55	\$38.55	High	None	0.70	6.15	Meats
Total (TOT)	★★★★	\$70	\$56.58	Medium	None	0.81	149.32	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$54.81	Medium	None	0.72	49.46	Horn
Assicurazioni Generali (G)	★★★	EUR 17.7	EUR 15.6	Very High	None	0.88	24.36	Heathfield
Capital One Financial (COF)	★★★★	\$120	\$94.65	Medium	Narrow	0.79	46.02	Plunkett
Invesco (IVZ)	★★★★	\$42	\$31.45	Medium	Narrow	0.75	12.80	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 685.6	Medium	None	0.78	9024.44	Kumagai
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 9.79	High	Narrow	0.75	13.31	Ellis
Westpac Banking (WBC)	★★★★	AUD 35	AUD 28.85	Medium	Wide	0.82	97.69	Ellis

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$162.58	Medium	Wide	0.62	53.26	Waterhouse
Express Scripts Holding (ESRX)	★★★★	\$92	\$70.47	Medium	Wide	0.77	39.55	Lekraj
Healthscope (HSO)	★★★★	AUD 2.4	AUD 1.94	Medium	Narrow	0.81	3.37	Kallos
McKesson (MCK)	★★★★	\$210	\$141.69	Medium	Wide	0.67	29.24	Lekraj
Ramsay Health Care (RHC)	★★★★	AUD 82	AUD 62.18	Medium	Narrow	0.76	12.57	Kallos
Roche Holding (ROG)	★★★★★	CHF 321	CHF 216	Low	Wide	0.67	184.78	Andersen
Shire (SHP)	★★★★★	GBX 4890	GBX 2996	Medium	Narrow	0.61	27.29	Andersen
Industrials								
Anixter International (AXE)	★★★★	\$107	\$75.6	Medium	Narrow	0.71	2.52	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 41.4	Medium	Narrow	0.71	52.25	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.73	Medium	Wide	0.87	15.48	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 124	HKD 94.8	Medium	None	0.76	365.71	Tan
Fluor (FLR)	★★★★	\$69	\$55.9	High	Narrow	0.81	7.82	Silver
G4S (GFS)	★★★★	GBX 337	GBX 238.4	Medium	None	0.71	3.70	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 35.16	Medium	Wide	0.75	6.39	Molina
Grupo Aeroportuario del Pacifico SAB de CV (GAP B)	★★★★	MXN 225	MXN 189.08	High	Wide	0.84	106.07	Higgins
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 4.75	High	None	0.70	40.61	Song
Johnson Controls International (JCI)	★★★★	\$53	\$35.5	High	Narrow	0.67	32.88	Bernard
KION GROUP (KGX)	★★★★	EUR 86	EUR 72.16	Medium	Narrow	0.84	8.51	Molina
Royal Philips (PHIA)	★★★★	EUR 40	EUR 32	Medium	Narrow	0.80	29.64	Vonk
Stericycle (SRCL)	★★★★	\$99	\$59.41	Very High	Wide	0.60	5.08	Schoonmaker
Real Estate								
AVEO Group (AOG)	★★★★	AUD 3.1	AUD 2.64	Medium	None	0.85	1.53	Sherlock
Sun Hung Kai Properties (16)	★★★★	HKD 153	HKD 127.1	Medium	Narrow	0.83	368.21	Zhong
Vornado Realty Trust (VNO)	★★★★	\$84	\$67.16	Medium	None	0.80	12.76	Schwer
Technology								
Guidewire Software (GWRE)	★★★★	\$100	\$82.99	Medium	Wide	0.83	6.63	Nelson
KLA-Tencor (KLAC)	★★★	\$125	\$112.92	High	Wide	0.90	17.60	Davuluri
LM Ericsson Telephone (ERIC B)	★★★	SEK 61	SEK 53.72	Very High	None	NA	176.32	Colello
MYOB Group (MYO)	★★★★	AUD 4.05	AUD 3.05	Medium	Narrow	0.75	1.84	James
Qualcomm (QCOM)	★★★★	\$75	\$55.58	High	Narrow	0.74	82.28	Davuluri
Sabre (SABR)	★★★★	\$26	\$21.63	Medium	Narrow	0.83	5.94	Wasiolek
Salesforce.com (CRM)	★★★★	\$145	\$118.04	Medium	Wide	0.81	86.45	Nelson
Synaptics (SYNA)	★★★★	\$64	\$46.09	Very High	None	0.72	1.59	Davuluri
TDK (6762)	★★★★	JPY 11500	JPY 9370	High	None	0.81	1182.49	Ito
Tencent Holdings (700)	★★★★	HKD 641	HKD 420	High	Wide	0.66	3989.42	Tam
Utilities								
Contact Energy (CEN)	★★★★	NZD 6.2	NZD 5.2	Medium	Narrow	0.84	3.72	Atkins
Dominion Energy (D)	★★★★	\$84	\$67.87	Low	Wide	0.81	44.22	Fishman
FirstEnergy (FE)	★★★★	\$40	\$34.45	Low	Narrow	0.86	16.38	Fishman
Gas Natural SDG (GAS)	★★★★	EUR 21	EUR 18.7	Medium	Narrow	0.89	18.70	Fulop
SCANA (SCG)	★★★★★	\$60	\$37.74	Medium	Narrow	0.63	5.38	Miller