

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	\$8.95	High	Narrow	0.53	3.60	Inton
Compass Minerals International (CMP)	★★★★	\$82	\$58.85	High	Wide	0.72	1.99	Goldstein
Communication Services								
BT Group (BT.A)	★★★★	GBX 370	GBX 225.75	High	Narrow	0.61	22.40	C. Nichols
China Mobile (941)	★★★★★	HKD 102	HKD 71.95	Medium	Narrow	0.71	1473.21	Baker
Telefonica (TEF)	★★★★	\$13	\$8.02	High	Narrow	0.62	41.68	C. Nichols
Telstra (TLS)	★★★★	AUD 4.6	AUD 3.14	Medium	Narrow	0.68	37.34	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$159	\$115.98	Medium	Narrow	0.73	8.58	Akbari
Bapcor (BAP)	★★★★	AUD 7	AUD 5.68	Medium	Narrow	0.81	1.59	Ragonese
Bayerische Motoren Werke (BMW)	★★★★	EUR 110	EUR 85.56	High	Narrow	0.78	55.62	Hilgert
Domino's Pizza Enterprises (DMP)	★★★★	AUD 53	AUD 41.73	Medium	Narrow	0.79	3.56	Faul
General Motors (GM)	★★★★	\$56	\$35.47	High	None	0.63	49.68	Whiston
Great Wall Motor (2333)	★★★★★	HKD 13.5	HKD 7.87	High	None	0.58	110.97	Hu
Hanesbrands (HBI)	★★★★★	\$29	\$18.38	Medium	Narrow	0.63	6.62	Weishaar
Mattel (MAT)	★★★★	\$21.5	\$13.1	High	Narrow	0.61	4.51	Katz
TripAdvisor (TRIP)	★★★★	\$55	\$40.61	High	Narrow	0.74	5.64	Wasiolek
Walt Disney (DIS)	★★★★	\$130	\$98.54	Medium	Wide	0.76	148.17	Macker
Williams-Sonoma (WSM)	★★★★	\$68	\$51.84	Medium	Narrow	0.76	4.34	Katz
WPP (WPP)	★★★★	GBX 1500	GBX 1138.5	Medium	Narrow	0.76	14.41	Mogharabi
Consumer Defensive								
General Mills (GIS)	★★★★★	\$59	\$44.35	Low	Wide	0.75	25.29	Vora
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2407	Low	Wide	0.62	22.96	Gorham
Kao (4452)	★★★★	JPY 8800	JPY 7932	Low	Wide	0.90	3908.69	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$40.59	Medium	Wide	0.80	60.37	Lash
Procter & Gamble (PG)	★★★★	\$98	\$78.84	Low	Wide	0.80	198.76	Lash
Reckitt Benckiser Group (RB.)	★★★★★	GBX 7400	GBX 5997	Low	Wide	0.81	42.23	Gorham
Energy								
Cenovus Energy (CVE)	★★★★	\$21	\$10.55	Very High	None	0.50	12.96	Gemino
Enbridge (ENB)	★★★★★	\$62	\$39.27	Medium	Wide	0.63	66.57	Gemino
Royal Dutch Shell (RDS.B)	★★★★	\$76	\$64.8	Low	None	0.85	266.72	Good
Total (TOT)	★★★★	\$70	\$56.2	Medium	None	0.80	149.67	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$54.52	Medium	None	0.72	49.24	Horn
Assicurazioni Generali (G)	★★★	EUR 17.7	EUR 15.56	Very High	None	0.88	24.30	Heathfield
Capital One Financial (COF)	★★★★	\$120	\$94.27	Medium	Narrow	0.79	45.83	Plunkett
Invesco (IVZ)	★★★★	\$42	\$31.48	Medium	Narrow	0.75	12.93	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 696.3	Medium	None	0.79	9165.28	Kumagai
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 9.63	High	Narrow	0.74	13.09	Ellis
Westpac Banking (WBC)	★★★★	AUD 35	AUD 28.62	Medium	Wide	0.82	96.91	Ellis

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$165.65	Medium	Wide	0.63	54.26	Waterhouse
Express Scripts Holding (ESRX)	★★★★	\$92	\$69.73	Medium	Wide	0.76	39.14	Lekraj
Healthscope (HSO)	★★★★	AUD 2.4	AUD 1.93	Medium	Narrow	0.80	3.37	Kallos
McKesson (MCK)	★★★★★	\$210	\$140.66	Medium	Wide	0.67	29.02	Lekraj
Ramsay Health Care (RHC)	★★★★	AUD 82	AUD 62.32	Medium	Narrow	0.76	12.59	Kallos
Roche Holding (ROG)	★★★★★	CHF 321	CHF 219.1	Low	Wide	0.68	187.51	Andersen
Shire (SHP)	★★★★★	GBX 4890	GBX 3500	Medium	Narrow	0.72	31.88	Andersen
Industrials								
Anixter International (AXE)	★★★★	\$107	\$74.35	Medium	Narrow	0.69	2.48	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 41	Medium	Narrow	0.71	51.74	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.98	Medium	Wide	0.89	15.88	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 124	HKD 93.9	Medium	None	0.76	362.24	Tan
Fluor (FLR)	★★★★	\$69	\$55.85	High	Narrow	0.81	7.81	Silver
G4S (GFS)	★★★★	GBX 337	GBX 246.4	Medium	None	0.73	3.82	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 34.08	Medium	Wide	0.73	6.20	Molina
Grupo Aeroportuario del Pacifico SAB de CV (GAP B)	★★★★	MXN 225	MXN 179.63	High	Wide	0.80	100.77	Higgins
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 4.64	High	None	0.68	38.83	Song
Johnson Controls International (JCI)	★★★★	\$53	\$34.29	High	Narrow	0.65	31.76	Bernard
KION GROUP (KGX)	★★★★	EUR 86	EUR 74.96	Medium	Narrow	0.87	8.84	Molina
Royal Philips (PHIA)	★★★★	EUR 40	EUR 30.89	Medium	Narrow	0.77	28.61	Vonk
Stericycle (SRCL)	★★★★	\$99	\$58.75	Very High	Wide	0.59	5.03	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 124	Medium	Narrow	0.81	359.23	Zhong
Vornado Realty Trust (VNO)	★★★★	\$84	\$67.52	Medium	None	0.80	12.83	Schwer
Technology								
Guidewire Software (GWRE)	★★★★	\$100	\$79.21	Medium	Wide	0.79	6.33	Nelson
KLA-Tencor (KLAC)	★★★	\$125	\$106.57	High	Wide	0.85	16.61	Davuluri
LM Ericsson Telephone (ERIC B)	★★★	SEK 61	SEK 53.96	Very High	None	NA	177.63	Colello
MYOB Group (MYO)	★★★★	AUD 4.05	AUD 3.05	Medium	Narrow	0.75	1.84	James
Qualcomm (QCOM)	★★★★	\$75	\$54.7	High	Narrow	0.73	80.98	Davuluri
Sabre (SABR)	★★★★	\$26	\$21.27	Medium	Narrow	0.82	5.84	Wasiolek
Salesforce.com (CRM)	★★★★	\$145	\$112.88	Medium	Wide	0.78	82.67	Nelson
Synaptics (SYNA)	★★★★	\$64	\$45.12	Very High	None	0.71	1.56	Davuluri
TDK (6762)	★★★★	JPY 11500	JPY 9310	High	None	0.81	1174.92	Ito
Tencent Holdings (700)	★★★★	HKD 641	HKD 409.6	High	Wide	0.64	3892.51	Tam
Utilities								
Contact Energy (CEN)	★★★★	NZD 6.2	NZD 5.25	Medium	Narrow	0.85	3.76	Atkins
Dominion Energy (D)	★★★★	\$84	\$67.79	Low	Wide	0.81	44.23	Fishman
FirstEnergy (FE)	★★★★	\$40	\$34.39	Low	Narrow	0.86	16.36	Fishman
Gas Natural SDG (GAS)	★★★	EUR 21	EUR 19.39	Medium	Narrow	0.92	19.39	Fulop
SCANA (SCG)	★★★★★	\$60	\$37.33	Medium	Narrow	0.62	5.32	Miller