

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	\$9.11	High	Narrow	0.54	3.73	Inton
Compass Minerals International (CMP)	★★★★	\$82	\$62.75	High	Wide	0.77	2.12	Goldstein
Communication Services								
BT Group (BT.A)	★★★★	GBX 370	GBX 240.55	High	Narrow	0.65	23.87	C. Nichols
China Mobile (941)	★★★★★	HKD 110	HKD 72.2	Medium	Narrow	0.66	1478.33	Baker
Telefonica (TEF)	★★★★	\$13	\$8.17	High	Narrow	0.63	42.42	C. Nichols
Telstra (TLS)	★★★★	AUD 4.6	AUD 3.44	Medium	Narrow	0.75	40.91	Han
Consumer Cyclical								
Advance Auto Parts (AAP)	★★★★	\$155	\$115.75	Medium	Narrow	0.75	8.56	Akbari
Bapcor (BAP)	★★★★	AUD 7	AUD 5.88	Medium	Narrow	0.84	1.64	Ragonese
Bayerische Motoren Werke (BMW)	★★★★	EUR 110	EUR 84.97	High	Narrow	0.77	55.12	Hilgert
Domino's Pizza Enterprises (DMP)	★★★★	AUD 53	AUD 43.7	Medium	Narrow	0.82	3.83	Faul
General Motors (GM)	★★★★	\$56	\$37.84	High	None	0.68	53.00	Whiston
Great Wall Motor (2333)	★★★★	HKD 14.9	HKD 8.96	High	None	0.60	120.19	Hu
Hanesbrands (HBI)	★★★★★	\$29	\$19.54	Medium	Narrow	0.67	7.04	Weishaar
Mattel (MAT)	★★★★	\$22.5	\$15.97	High	Narrow	0.71	5.49	Katz
TripAdvisor (TRIP)	★★★★	\$55	\$42.45	High	Narrow	0.77	5.90	Wasiolek
Walt Disney (DIS)	★★★★	\$130	\$104.03	Medium	Wide	0.80	156.43	Macker
Williams-Sonoma (WSM)	★★★★	\$65	\$52.29	Medium	Narrow	0.80	4.40	Katz
WPP (WPP)	★★★★	GBX 1500	GBX 1230.5	Medium	Narrow	0.82	15.62	Mogharabi
Consumer Defensive								
General Mills (GIS)	★★★★	\$61	\$51.7	Low	Wide	0.85	29.42	Vora
Imperial Brands (IMB)	★★★★★	GBX 3900	GBX 2595.5	Low	Wide	0.67	24.75	Gorham
Kao (4452)	★★★★	JPY 8800	JPY 7662	Low	Wide	0.87	3707.35	Wei
Mondelez International (MDLZ)	★★★★	\$51	\$44	Medium	Wide	0.86	65.44	Lash
Procter & Gamble (PG)	★★★★	\$98	\$79.97	Low	Wide	0.82	201.60	Lash
Reckitt Benckiser Group (RB.)	★★★★★	GBX 7400	GBX 5752	Low	Wide	0.78	40.51	Gorham
Energy								
Cenovus Energy (CVE)	★★★★★	\$21	\$10.27	Very High	None	0.49	12.62	Gemino
Enbridge (ENB)	★★★★★	\$64	\$41.11	Medium	Wide	0.64	69.69	Gemino
Royal Dutch Shell (RDS.B)	★★★★	\$76	\$64.11	Low	None	0.84	264.38	Good
RSP Permian (RSPP)	★★★★	\$55	\$40.08	High	None	0.73	6.39	Meats
Total (TOT)	★★★★	\$70	\$57.19	Medium	None	0.82	145.31	Good
Financial Services								
American International Group (AIG)	★★★★	\$76	\$56.27	Medium	None	0.74	50.78	Horn
Assicurazioni Generali (G)	★★★	EUR 17.7	EUR 15.5	Very High	None	0.88	24.20	Heathfield
Capital One Financial (COF)	★★★★	\$120	\$98.15	Medium	Narrow	0.82	47.73	Plunkett
Invesco (IVZ)	★★★★	\$42	\$33.9	Medium	Narrow	0.81	13.80	Warren
Mitsubishi UFJ Financial Group (8306)	★★★★	JPY 880	JPY 717.1	Medium	None	0.81	9439.07	Kumagai
QBE Insurance Group (QBE)	★★★★	AUD 13	AUD 9.95	High	Narrow	0.77	13.53	Ellis
Westpac Banking (WBC)	★★★★	AUD 35	AUD 30.09	Medium	Wide	0.86	101.89	Ellis

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Healthcare								
Allergan (AGN)	★★★★★	\$263	\$153.5	Medium	Wide	0.58	50.70	Waterhouse
Express Scripts Holding (ESRX)	★★★★	\$92	\$79.72	Medium	Wide	0.87	44.99	Lekraj
Healthscope (HSO)	★★★★	AUD 2.4	AUD 1.97	Medium	Narrow	0.82	3.42	Kallos
McKesson (MCK)	★★★★	\$210	\$153.98	Medium	Wide	0.73	31.77	Lekraj
Ramsay Health Care (RHC)	★★★★	AUD 82	AUD 64.11	Medium	Narrow	0.78	12.96	Kallos
Roche Holding (ROG)	★★★★★	CHF 321	CHF 229	Low	Wide	0.71	196.36	Andersen
Shire (SHP)	★★★★★	GBX 4890	GBX 3228.5	Medium	Narrow	0.66	29.40	Andersen
Industrials								
Anixter International (AXE)	★★★★	\$107	\$75.8	Medium	Narrow	0.71	2.52	Bernard
Beijing Enterprises Holdings (392)	★★★★	HKD 58	HKD 43.85	Medium	Narrow	0.76	55.34	Song
Brambles (BXB)	★★★★	AUD 11.2	AUD 9.42	Medium	Wide	0.84	14.99	Fleck
CK Hutchison Holdings (1)	★★★★	HKD 120	HKD 98.75	Medium	None	0.82	380.95	Tan
Fluor (FLR)	★★★★	\$69	\$57.17	High	Narrow	0.83	8.00	Silver
G4S (GFS)	★★★★	GBX 312	GBX 258.3	Medium	None	0.83	4.01	Field
GEA Group (G1A)	★★★★	EUR 47	EUR 38.43	Medium	Wide	0.82	6.99	Molina
Grupo Aeroportuario del Pacifico SAB de CV (GAP B)	★★★★	MXN 225	MXN 185.6	High	Wide	0.82	104.12	Higgins
Guangshen Railway (525)	★★★★	HKD 6.8	HKD 5.04	High	None	0.74	40.95	Song
Johnson Controls International (JCI)	★★★★	\$53	\$37.63	High	Narrow	0.71	34.85	Bernard
KION GROUP (KGX)	★★★★	EUR 86	EUR 71.16	Medium	Narrow	0.83	8.39	Molina
Royal Philips (PHIA)	★★★★	EUR 40	EUR 31.83	Medium	Narrow	0.80	29.06	Vonk
Stericycle (SRCL)	★★★★	\$99	\$63.81	Very High	Wide	0.64	5.46	Schoonmaker
Real Estate								
AVEO Group (AOG)	★★★★	AUD 3.1	AUD 2.69	Medium	None	0.87	1.56	Sherlock
Sun Hung Kai Properties (16)	★★★★	HKD 153	HKD 130	Medium	Narrow	0.85	376.61	Zhong
Vornado Realty Trust (VNO)	★★★★	\$84	\$67.62	Medium	None	0.81	12.85	Schwer
Technology								
Guidewire Software (GWRE)	★★★★	\$100	\$88.22	Medium	Wide	0.88	6.82	Nelson
KLA-Tencor (KLAC)	★★★	\$125	\$117	High	Wide	0.94	18.32	Davuluri
MYOB Group (MYO)	★★★★	AUD 4.05	AUD 3.1	Medium	Narrow	0.77	1.87	James
Qualcomm (QCOM)	★★★	\$75	\$61.82	High	Narrow	0.82	91.52	Davuluri
Sabre (SABR)	★★★★	\$26	\$22.65	Medium	Narrow	0.87	6.22	Wasiolek
Salesforce.com (CRM)	★★★★	\$145	\$126.36	Medium	Wide	0.87	91.27	Nelson
Synaptics (SYNA)	★★★★	\$64	\$48.53	Very High	None	0.76	1.67	Davuluri
TDK (6762)	★★★★	JPY 11500	JPY 9650	High	None	0.84	1217.83	Ito
Tencent Holdings (700)	★★★	HKD 492	HKD 447	High	Wide	0.91	4245.89	Tam
Utilities								
Contact Energy (CEN)	★★★★	NZD 6.2	NZD 5.35	Medium	Narrow	0.86	3.83	Atkins
Dominion Energy (D)	★★★★	\$87	\$72.83	Low	Wide	0.84	47.45	Fishman
FirstEnergy (FE)	★★★★	\$40	\$31.8	Low	Narrow	0.80	15.12	Fishman
Gas Natural SDG (GAS)	★★★★	EUR 21	EUR 18.71	Medium	Narrow	0.89	18.71	Fulop
SCANA (SCG)	★★★★★	\$60	\$41.2	Medium	Narrow	0.69	5.88	Miller