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[Biotech: If You Thought 2015 Was Tough...](#)

Barron's Blogs, 2015 年 12 月 24 日 14:52, 419 字, By Ben Levisohn, (英文)

After outperforming the S&P 500 by 20 percentage points in 2014 and 30 points in 2013, the iShares Biotechnology ETF (IBB) has outperformed by "just" nine points heading into the end of the year. In a report released on Dec. 21, RBC's ...

文件 WCBBE00020151224ebco000rt

[Still a F.A.N.G. Year in '16, Says Morgan Stanley; Maybe Qualcomm, Apple](#)

Barron's Blogs, 2015 年 12 月 22 日 20:44, 487 字, By Tiernan Ray, (英文)

Is there anything to own in 2016 besides FANG — Facebook (FB), Amazon.com (AMZN), Netflix (NFLX), and Alphabet/Google (GOOGL)? That's one question tackled today by Morgan Stanley's Adam Parker in a think piece about what to do after ...

文件 WCBBE00020151222ebcm002s1

[Stocks: Is There Life After FANG?](#)

Barron's Blogs, 2015 年 12 月 21 日 16:00, 510 字, By Ben Levisohn, (英文)

Morgan Stanley's Adam Parker and team argued there's life outside of Facebook (FB), Amazon.com (AMZN), Netflix (NFLX), and the company formerly known as Google (GOOGL)--otherwise known as FANG--which have done the heavy lifting for the ...

文件 WCBBE00020151221ebcl001e1

[Boeing Jumps on Buyback Boost, Dividend Hike](#)

Barron's Blogs, 2015 年 12 月 14 日 22:57, 191 字, By Ben Levisohn, (英文)

Shares of Boeing (BA) has gained more than 1% after the aerospace giant announced that it would buy back more shares and raised its dividend. Wells Fargo's Sam Pearlstein explains:

文件 WCBBE00020151214ebce0030d

[General Electric: 'Here's What Happens Next'](#)

Barron's Blogs, 2015 年 11 月 30 日 15:29, 388 字, By Ben Levisohn, (英文)

RBC's Deane Dray and team offer their predictions for what's coming next for General Electric (GE): GE is in the throes of more change today than at any other time in its 123-year history. The sell-down of GE Capital continues at a breakneck ...

文件 WCBBE00020151130ebbu001b9

[The Examiners: Public Policy on Executive Pay Falls Short](#)

WSJ Blogs, 2015 年 11 月 20 日 17:49, 593 字, By Anders J. Maxwell, (英文)

When it comes to pre-bankruptcy insider pay , how much disclosure is enough? There has been a plethora of proposed regulations promulgated in the past decade regarding executive compensation. Several proposals have actually been adopted. In ...

文件 WCWSJB0020151120ebbk00192

[Goldman Sachs: Six Complicated Trades for 2016](#)

Barron's Blogs, 2015 年 11 月 19 日 18:28, 737 字, By Ben Levisohn, (英文)

Goldman Sachs strategist Francesco Garzarelli and team offer their six highest conviction trades for 2016: Top Trade #1: Long US Dollar vs short Euro and Yen ...

文件 WCBBE00020151119ebbj001uq

[General Electric: So Long Synchrony Financial, Here Comes the Cash](#)

Barron's Blogs, 2015 年 10 月 15 日 16:05, 365 字, By Ben Levisohn, (英文)

Citigroup's Donald Fandetti and team think the Fed's approval of the final spin of Synchrony Financial (SYF) by General Electric (GE) will remove an overhang for the former's stock:
文件 WCBBE00020151015ebaf0018h

 [United Technologies: Sidelined](#)

Barron's Blogs, 2015 年 10 月 13 日 16:15, 276 字, By Ben Levisohn, (英文)

RBC's Robert Stallard and team argue that it's time to take profits in United Technologies (UTX):Like other economically driven industrial stocks, United Technologies shares have enjoyed a rally in the last couple of weeks, having moved up ...

文件 WCBBE00020151013ebad001bc

 [Five Industrial Stocks That Might Be Worth a Look](#)

Barron's Blogs, 2015 年 9 月 18 日 16:57, 317 字, By Ben Levisohn, (英文)

Morgan Stanley strategist Adam Parker isn't a fan of industrials. But that doesn't mean some of them--including United Technologies (UTX), Danaher (DHR), Delta Air Lines (DAL), CSX Corp. (CSX), and SPX Corp. (SPX)--aren't worth buying.

文件 WCBBE00020150918eb9i001xh

 [Wall Street Strategists are Lowering Their Targets...And That's Good News](#)

Barron's Blogs, 2015 年 9 月 8 日 17:59, 726 字, By Ben Levisohn, (英文)

Two of Wall Street's bulls lowered their S&P 500 targets today, but that's not necessarily bad news for the market.BofA Merrill Lynch's Savita Subramanian and team explain why they lowered their S&P 500 target to 2,100 from 2,200...

文件 WCBBE00020150908eb9800231

 [Why ExxonMobil Will Beat the S&P 500](#)

Barron's Blogs, 2015 年 9 月 1 日 19:22, 466 字, By Ben Levisohn, (英文)

Barclays' Paul Cheng contends that ExxonMobil (XOM)--and much of the energy sector--could outperform the market during the next 12 months thanks to a dividend yield that's nearly twice as high as the S&P 500's. He explains:

文件 WCBBE00020150901eb91002xl

 [Soros Cuts Stakes in Chinese Internet Giants Alibaba, Baidu](#)

WSJ Blogs, 2015 年 8 月 14 日 22:12, 329 字, By Austen Hufford, (英文)

Soros Fund Management LLC largely sold off its stakes in Chinese Internet giants Alibaba Group Holding Ltd. and Baidu Inc., while buying an ETF that tracks large-cap Chinese companies and another that follows companies in emerging markets.

文件 WCWSJB0020150814eb8e0050l

 [Texas Instruments: Macquarie Ups to Buy; 'Peak Multiple' Might Mean \\$69/Sh](#)

Barron's Blogs, 2015 年 8 月 10 日 23:52, 601 字, By Tiernan Ray, (英文)

Shares of analog chip giant Texas Instruments (TXN) are up \$1.68, or over 3%, at \$52, after Macquarie Capital USA's Deepon Nag this morning raised his rating on the shares to Outperform from Neutral, and raises his price target to \$60 from ...

文件 WCBBE00020150810eb8a001up

 [Kors Jumps 10% As Q1, Full Year Forecast Beat Expectations](#)

Barron's Blogs, 2015 年 8 月 6 日 15:43, 444 字, By Teresa Rivas, (英文)

Michael Kors (KORS) is up more than 10% in Thursday morning trading, as its better-than expected first quarter overshadowed mixed guidance.

文件 WCBBE00020150806eb86001e1

 [Nvidia: Macquarie Ups to Buy; High-End PCs Firm, Royalties Under-Appreciated](#)

Barron's Blogs, 2015 年 8 月 3 日 17:02, 541 字, By Tiernan Ray, (英文)

Shares of graphics chip experts Nvidia (NVDA) are up 10 cents, or half a percent, at \$20.05, after Macquarie Research's Deepon Nag raised his rating on the shares to Outperform from Neutral, with a \$24 price target, in advance of the ...

文件 WCBBE00020150803eb8300209

 [What to Expect from Biogen and Celgene](#)

Barron's Blogs, 2015 年 7 月 20 日 21:58, 534 字, By Ben Levisohn, (英文)

Barclays' Geoff Meacham offers his thoughts on earnings season for biotech, which begins this week when Biogen (BIIB) and Celgene (CELG) report their second-quarter results:

文件 WCBBE00020150720eb7k002gx

 [Bernstein Predicts Bull Market for U.S. Bank Stocks](#)

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WSJ Blogs, 2015 年 6 月 16 日 14:51, 513 字, By Giles Turner, (英文)

U.S. bank stocks have been on a tear over the past few months, thanks to a spell of rising bond yields. Analysts at Bernstein say the party could continue.

文件 WCWSJB0020150616eb6g003h2

■ Why Caterpillar Can Gain 25%

Barron's Blogs, 2015 年 6 月 3 日 15:26, 274 字, By Ben Levisohn, (英文)

Caterpillar (CAT) has been a sure way to lose money during the past year. Now Societe Generale's Henry Kirn and team argue that the beaten-down equipment manufacturer can gain 25%. They explain why:

文件 WCBBE00020150603eb630018h

■ Will The ChiNext Bubble Derail China's Bull Run?

Barron's Blogs, 2015 年 6 月 1 日 04:31, 487 字, By Shuli Ren, (英文)

China's Nasdaq-style ChiNext board in Shenzhen is raising eyebrows. The ChiNext Price Index has returned over 200% and 150% in the last one year and year-to-date, and is now valued at 117 times historical earnings. Even on a future earnings ...

文件 WCBBE00020150601eb61000b5

■ Dow Industrials, S&P 500 Hit New Highs, But Nasdaq, Small Caps Get the Big Gains

Barron's Blogs, 2015 年 5 月 19 日 00:26, 584 字, By Ben Levisohn, (英文)

The S&P 500 and the Dow Jones Industrial Average might have hit new highs today, but it was the Nasdaq Composite and the small-company Russell 2000 that had the big gains.

文件 WCBBE00020150518eb5i003d

■ David Tepper's Appaloosa Management Boosts ETF Investments, GM Stake

WSJ Blogs, 2015 年 5 月 15 日 22:07, 254 字, By Juliet Chung, (英文)

David Tepper's Appaloosa Management LP added to its stock exposure in the first quarter, adding to its investments in exchange-traded funds while also increasing its position in General Motors Co., where it has been a longtime shareholder.

文件 WCWSJB0020150515eb5f006e1

■ Sure, the Biotech Sector is Getting Hammered. Here's How to Take Advantage.

Barron's Blogs, 2015 年 5 月 5 日 19:32, 364 字, By Ben Levisohn, (英文)

Deutsche Bank's Robyn Karnauskas warns that the biotech sector will likely remain weak but thinks AbbVie (ABBV) and BioMarin (BMRN)--which have been outperforming--and Celgene (CELG) and Alexion Pharmaceuticals (ALXN)--which have ...

文件 WCBBE00020150505eb55002be

■ Morgan Stanley: 'We are Full of Bull'

Barron's Blogs, 2015 年 4 月 27 日 17:00, 504 字, By Ben Levisohn, (英文)

In a report titled We are Full of Bull, Morgan Stanley's Adam Parker and team explain why they still like U.S. stocks: The consensus is firmly that we will be choppy and end the year up mid-single digits – at best. Investors highlight an ...

文件 WCBBE00020150427eb4r001rx

■ Starbucks: That Caffeinated Feeling

Barron's Blogs, 2015 年 4 月 24 日 16:14, 508 字, By Ben Levisohn, (英文)

Shares of Starbucks (SBUX) are percolating after the coffee seller reported stronger-than-expected sales and offered third-quarter guidance that could be above analyst forecasts. It also said same-store sales rose 7% globally. Wells Fargo's ...

文件 WCBBE00020150424eb4o0015p

■ China Rally To Continue: Beijing Allows Investors Up To 20 Stock Accounts

Barron's Blogs, 2015 年 4 月 13 日 02:03, 654 字, By Shuli Ren, (英文)

To foster competition among brokerages, Beijing said over the weekend that Chinese investors will no longer be restricted to only one stock account in China's A-Share market and each can have up to 20 stock accounts, starting today, ...

文件 WCBBE00020150413eb4d0002t

■ Investors Like the Possibility of a Big Intel Deal for Altera

WSJ Blogs, 2015 年 3 月 27 日 20:07, 161 字, By Maureen Farrell, (英文)

A possible deal at Intel Corp. led the semiconductor sector and the broader market higher Friday afternoon. Before the close of trading, the Journal reported that Intel is in talks to buy Altera Corp. If it's consummated, the deal would be ...

文件 WCWSJB0020150327eb3r00795

American Express: 'Stasis'

Barron's Blogs, 2015 年 3 月 27 日 16:37, 168 字, By Ben Levisohn, (英文)

After attending this week's investor meeting, JPMorgan's Richard Shane and team think shares of American Express (AXP) will be "range-bound" for a while:

文件 WCBBE00020150327eb3r001rx

Biotech: 'Unprecedented Times,' Not a Bubble

Barron's Blogs, 2015 年 3 月 27 日 14:37, 423 字, By Ben Levisohn, (英文)

Credit Suisse analyst Ravi Mehrotra and team don't think biotech stocks--including Biogen Idec (BIIB) and Celgene (CELG)--are in a bubble. He explains why:

文件 WCBBE00020150327eb3r0012x

Why Biogen Deserves a Higher Valuation

Barron's Blogs, 2015 年 3 月 19 日 14:59, 284 字, By Ben Levisohn, (英文)

Biogen Idec (BIIB) is more expensive than Gilead Sciences (GILD), Amgen (AMGN) and Celgene (CELG)--and Credit Suisse analyst Ravi Mehrotra and team believes it should be. They explain why:

文件 WCBBE00020150319eb3j0015q

Biotech: Higher Rates Could Hurt

Barron's Blogs, 2015 年 3 月 16 日 15:54, 279 字, By Ben Levisohn, (英文)

With a Fed rate hike looking likely to happen this year, Deutsche Bank's Robyn Karnauskas and team note that biotech stocks generally head in the opposite direction of rates:

文件 WCBBE00020150316eb3g001ba

Our Lonely Eyes Turn to You: Dow Industrials Shed 100 Points, Nasdaq 5,000 Slips Away

Barron's Blogs, 2015 年 3 月 4 日 21:48, 274 字, By Ben Levisohn, (英文)

Nasdaq 5,000 seems like a long time ago after following another day of selling in the market. The Dow Jones Industrial Average dropped 106.47 points, or 0.6%, to 18,096.90, and the S&P 500 fell 0.4% to 2,098.53. The Nasdaq slipped 0.3% ...

文件 WCBBE00020150304eb34002e5

Never Mind Exxon, Buy Chevron For Growth, Royal Dutch for Defense

Barron's Blogs, 2015 年 2 月 27 日 20:34, 307 字, By Ben Levisohn, (英文)

Jefferies' Jason Gammel and Marc Kofler highlight ExxonMobil's (XOM) strong relative performance since oil crashed, but think Royal Dutch Shell (RDS.A) and Chevron (CVX) could be better options. They explain why:

文件 WCBBE00020150227eb2r002jp

Zayo: Macquarie Says Sell on Slowing Return on Capital; AMT, SBAC Doing Better

Barron's Blogs, 2015 年 2 月 17 日 18:23, 540 字, By Tiernan Ray, (英文)

Shares of fiber-optic services provider Zayo Group Holdings (ZAYO), which went public on October 17th, are down 53 cents, or 1.8%, at \$28.70, after Macquarie's Kevin Smithen cut his rating on the shares this morning to Underperform from ...

文件 WCBBE00020150217eb2h00209

Five Reasons to Buy Valero Energy, Sell Tesoro

Barron's Blogs, 2015 年 2 月 13 日 15:53, 287 字, By Ben Levisohn, (英文)

All oil refiners are the same, right? Wrong, say the folks at Goldman Sachs, who urge investors swap out of Tesoro (TSO) and into Valero Energy (VLO). Analyst Neil Mehta and team offer five reasons why:

文件 WCBBE00020150213eb2d00105

Airlines Tumble and It's Not Just About Oil Prices

Barron's Blogs, 2015 年 2 月 9 日 16:35, 462 字, By Ben Levisohn, (英文)

With oil prices rising today, shares of American Airlines (AAL), Southwest Airlines (LUV), Delta Air Lines (DAL), and United Continental (UAL) are tumbling. But there's more to the airline trade than just fuel prices, as Southwest and ...

文件 WCBBE00020150209eb290015p

Energy Stocks Won't Always Follow the Price of Oil

Barron's Blogs, 2015 年 2 月 6 日 19:48, 383 字, By Ben Levisohn, (英文)

Sure, it feels like energy stocks are tied to oil prices with a string right now, what with the Energy Select Sector SPDR (XLE) seemingly tied to the price of crude by a string. But that's not always the case, says Deutsche Bank's Stephen ...

文件 WCBBE00020150206eb26002p9

Will Starbucks COO Come Back?

Barron's Blogs, 2015 年 1 月 9 日 18:29, 423 字, By Johanna Bennett, (英文)

Is Starbucks (SBUX) COO Troy Alstead gone for good?JP Morgan analyst John Ivankoe hints at just that in a note published today. He remarks that CEO Howard Schultz comments regarding Alstead's decision to take an unpaid leave of absence to ...

文件 WCBBE00020150109eb19001md

 [Micron Pares Losses after FYQ2 View Underwhelms; Bulls Defend the New Normal](#)

Barron's Blogs, 2015 年 1 月 7 日 15:51, 1134 字, By Tiernan Ray, (英文)

The Street today is trying to figure out what to do with the shares of memory chip maker Micron Technology (MU), whose stock yesterday afternoon fell over 6% in late trading after the company slightly missed fiscal Q1 revenue estimates and ...

文件 WCBBE00020150107eb17000xd

 [Time For a Biotech Pullback?](#)

Barron's Blogs, 2015 年 1 月 6 日 17:05, 235 字, By Ben Levisohn, (英文)

Citigroup's Yaron Werber and team think so. They removed Vertex Pharmaceuticals (VRTX) from their most-preferred list, while recommending investors favor Gilead Sciences (GILD) and Celgene (CELG). They explain:

文件 WCBBE00020150106eb16001md

 [Qorvo Rising: Canaccord, MKM Cheer Bright Prospects](#)

Barron's Blogs, 2015 年 1 月 2 日 19:52, 552 字, By Tiernan Ray, (英文)

Qorvo (QRVO), the wireless chip maker born of the union between RF Micro Devices and TriQuint Semiconductor, started trading today after the deal closed at the end of the year, and it is up \$2.26, or 3.4%, at \$68.62 -- an especially nice ...

文件 WCBBE00020150102eb1200231