



COVID

Not much of an introduction this week as I've had some terrible fatigue after battling COVID. Fortunately, my initial symptoms only lasted three days and were not much worse than a mild cold.

But holy cow! After that, fatigue set in. I would wake up like normal around 6 am and had plenty of energy to work out. By 10:30 am though, it was lights out. Next thing I knew it was 2:30 pm. Those four-hour naps lasted day after day for a week.

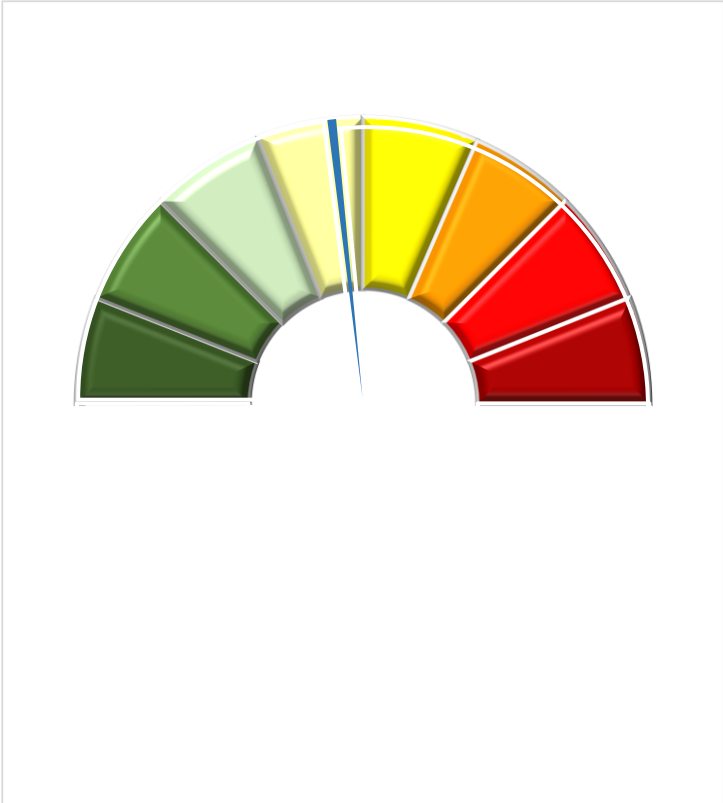
So right now, it's a bit hard to focus. Even as I type this, I am wiped. Hopefully, I'll be full strength in a few days.

The *Risk-O-Meter* moved to the middle of the range. It did not hit the "green zone" so caution is still warranted.

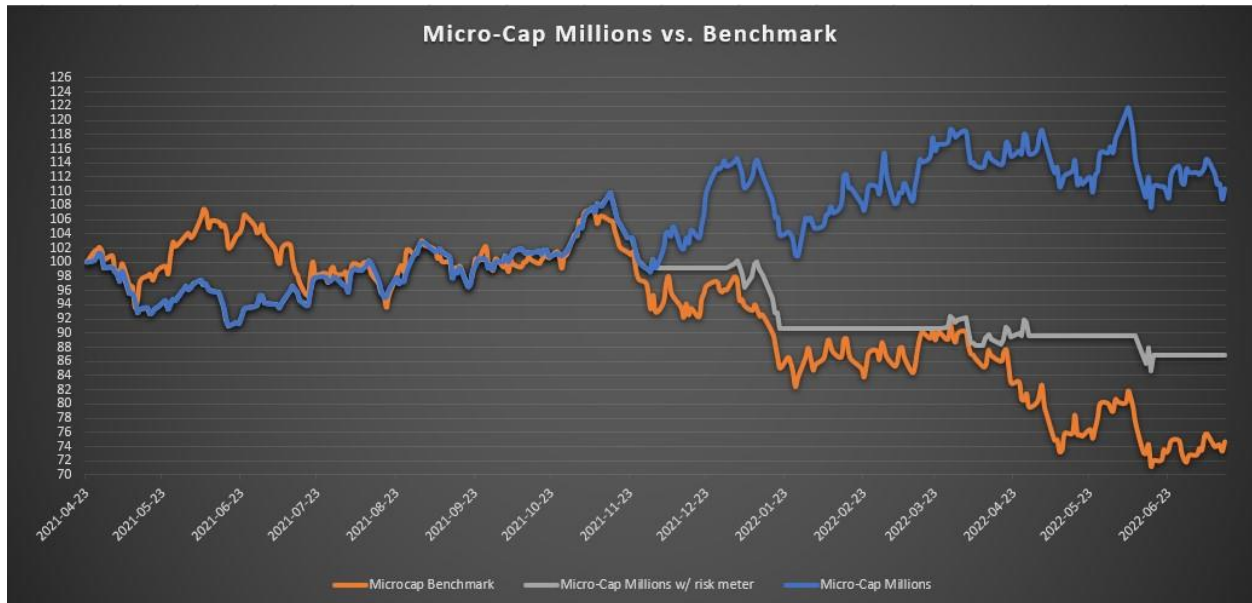
I do not see any edge in either direction. The market could easily go up one day and down the next. We are still in No Man's Land.

Lastly, there are a higher number of trades than usual this week. The increased turnover is the result of some issues with the data provider and how they report a company's sector.

We wrote our own code to increase accuracy and that led to more trades than usual. However, these changes should lead to more normal levels of trading activity from here on out (although we will see what happens next week).



Micro-Cap Millions



There are five trades this week.

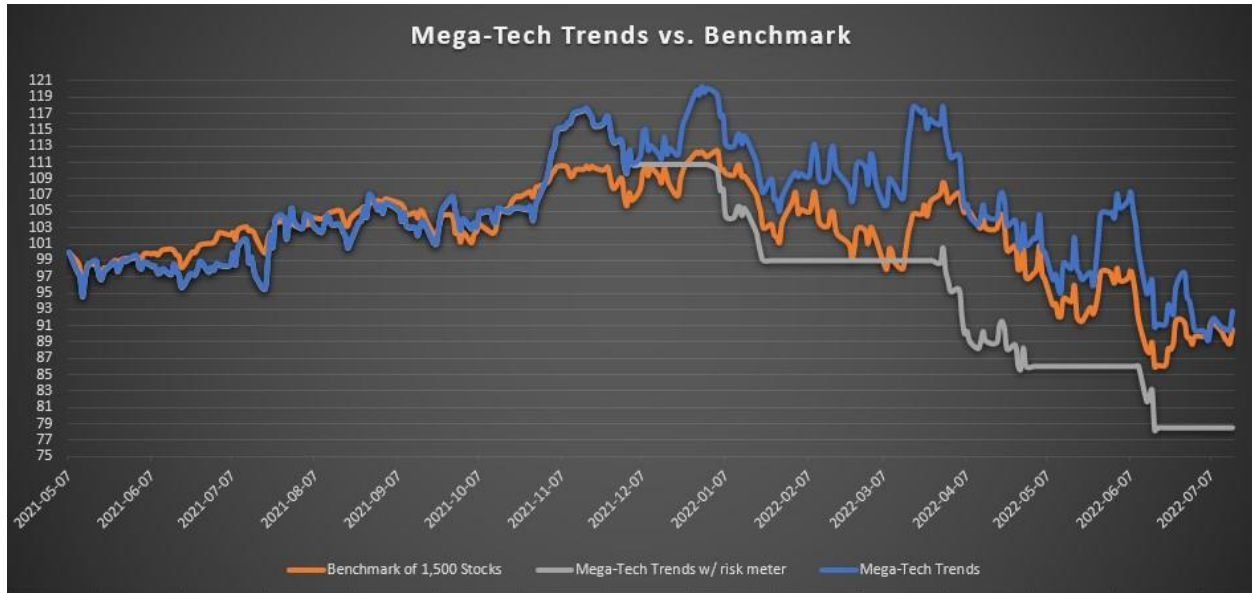
Buy Alpine Immune Sciences (Nasdaq: ALPN), CoreCard Corp. (NYSE: CCRD), iRadimed Corp. (Nasdaq: IRMD), Peron Network Ltd (Nasdaq: PERI), and Sensus Healthcare (Nasdaq: SRTS)

Sell Canterbury Park Holding (Nasdaq: CPHC), Hudson Global (Nasdaq: HSON), NL Industries (NYSE: NL), Quipt Home Medical (Nasdaq: QIPT), Resources Connection (Nasdaq: RGP)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ALPN	Alpine Immune Sciences Inc	0.00%	NEW	Healthcare
ASRT	Assertio Holdings Inc	3.30%	18	Healthcare
CCRD	CoreCard Corporation	0.00%	NEW	Technology
CTG	Computer Task Group Inc	-8.79%	39	Technology
HCKT	Hackett Group Inc (The)	-7.29%	116	Technology
IRMD	iRadimed Corp	0.00%	NEW	Healthcare
PERI	Perion Network Ltd	0.00%	NEW	Technology
SCSC	ScanSource Inc	-21.13%	46	Technology
SRTS	Sensus Healthcare Inc	0.00%	NEW	Healthcare
WSTG	Wayside Technology Group	-18.67%	53	Technology

Mega-Tech Trends



There are four buys and five sells this week.

Buy Axcelis Technologies (Nasdaq: ACLS), Arlo Technologies (NYSE: ARLO), Hologic (Nasdaq: HOLX), and TD SYNEX Corp. (NYSE: SNX)

Sell Avnet, Inc. (Nasdaq: AVT), Centene Corp. (NYSE: CNC), Diodes, Inc. (Nasdaq: DIOD), Humana, Inc. (NYSE: HUM), and Korn Ferry (NYSE: KFY)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ACLS	Axcelis Technologies Inc.	0.00%	NEW	Technology
ARLO	Arlo Technologies Inc	0.00%	NEW	Technology
CDW	CDW Corp	0.82%	53	Technology
HOLX	Hologic Inc	0.00%	NEW	Healthcare
LFUS	Littelfuse Inc	-7.70%	60	Technology
NTCT	NetScout Systems Inc	-5.44%	18	Technology
PLAB	Photronics Inc	12.95%	123	Technology
SCSC	ScanSource Inc	-20.82%	39	Technology
SNX	TD SYNEX Corporation	0.00%	NEW	Technology

Much like the issue with the industry classification with the data provider, writing some new code led to only nine holdings this week. That’s why there’s five stocks to sell and four to buy. Again, this should normalize sooner than later.

Large-Cap Leaders



There are two trades this week.

Buy Salesforce, Inc. (NYSE: CRM) and Cognizant Technology (Nasdaq: CTSH)

Sell Cigna Corp. (NYSE: CI) and Humana, Inc. (NYSE: HUM)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ADI	Analog Devices Inc	-5.72%	46	Technology
APH	Amphenol Corp	-16.05%	158	Technology
AVGO	Broadcom Inc	-0.84%	25	Technology
CDNS	Cadence Design Systems Inc	1.49%	130	Technology
CDW	CDW Corp	-5.34%	67	Technology
CRM	SALESFORCE INC	0.00%	NEW	Technology
CTSH	Cognizant Technology Solutions Corp	0.00%	NEW	Technology
FTNT	Fortinet Inc	1.84%	18	Technology
IT	Gartner Inc	-5.80%	60	Technology
KLAC	KLA Corp	2.96%	4	Technology

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