



Giving Thanks

I hope everyone had a wonderful Thanksgiving holiday.

It's my favorite holiday of the year! I have a lot to be thankful for. It's a good day to pause and reflect. It's also a good day to share a meal with loved ones.

Another reason I enjoy Thanksgiving is that it has yet to become too commercialized.

There was a trend toward retailers opening up on Thanksgiving to pull in some extra Black Friday sales.

Thankfully, that trend ended. Major retailers like Wal-Mart, Target, and Home Depot closed for Thanksgiving!

Americans got a one-day shopping break from buying shit they don't need with money they don't have.

I'm thankful for that!

The *Risk-O-Meter* remains in the green zone.

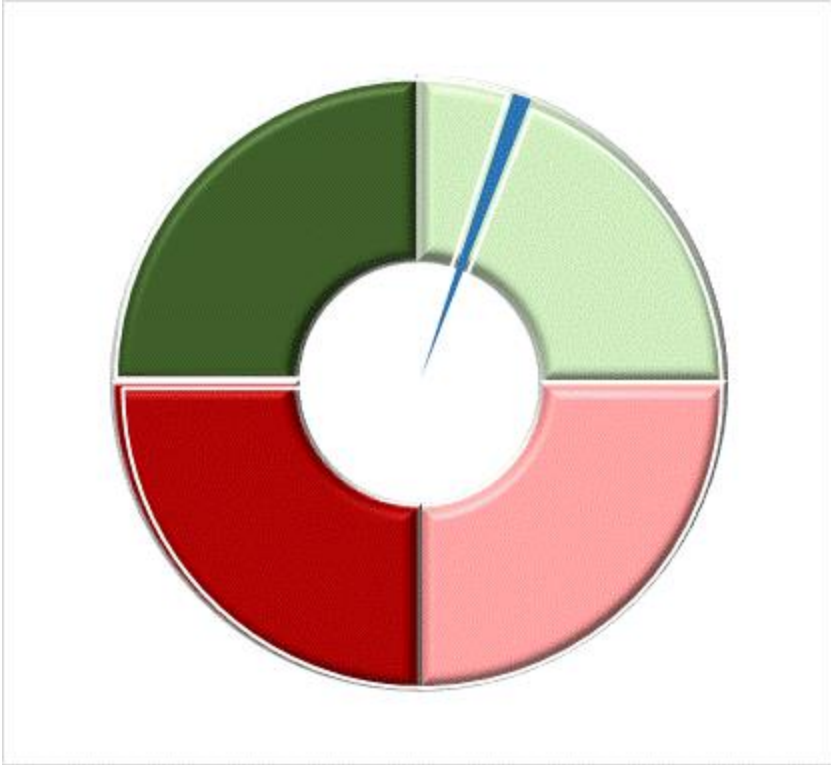
The market is still overbought. I'm skeptical that the recent positive stock action is the start of a new bull market.

Stocks do not start bull markets from nosebleed valuations.

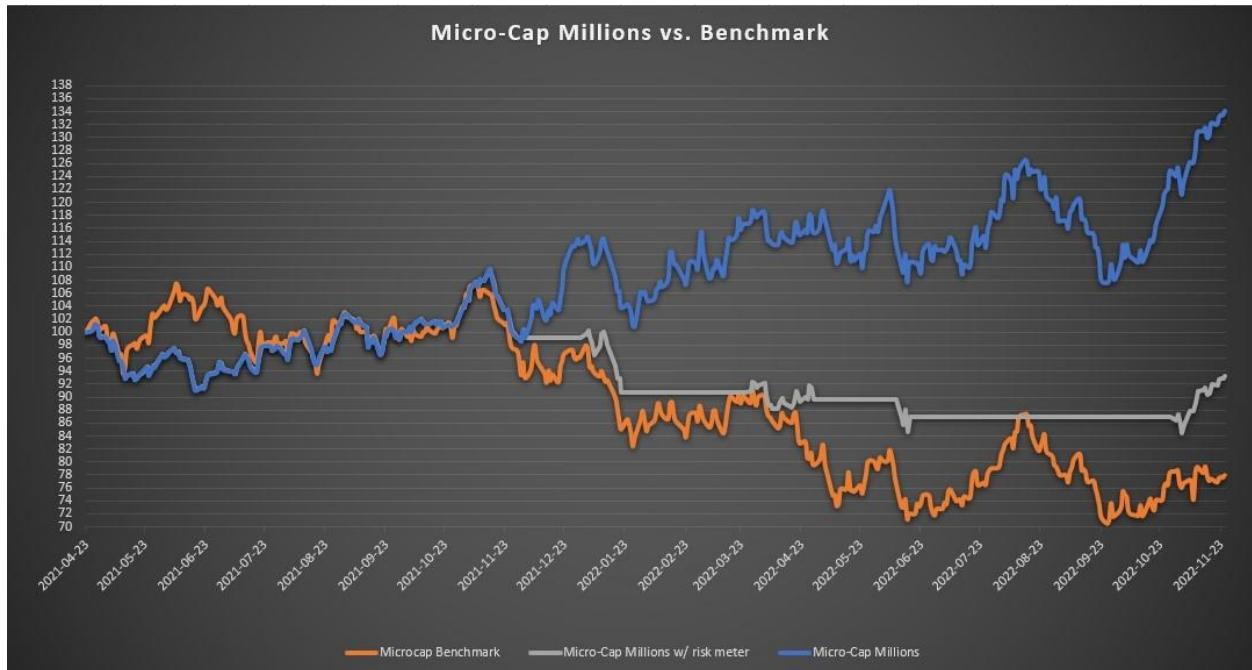
Furthermore, the number of stocks hitting new 52-week highs is weak.

There are also plenty of stocks rallying on light volume. The lack of institutional support suggests that those rallies will run out of steam.

Undoubtedly, we will continue to have nerve-wracking volatility in the months ahead.



Micro-Cap Millions

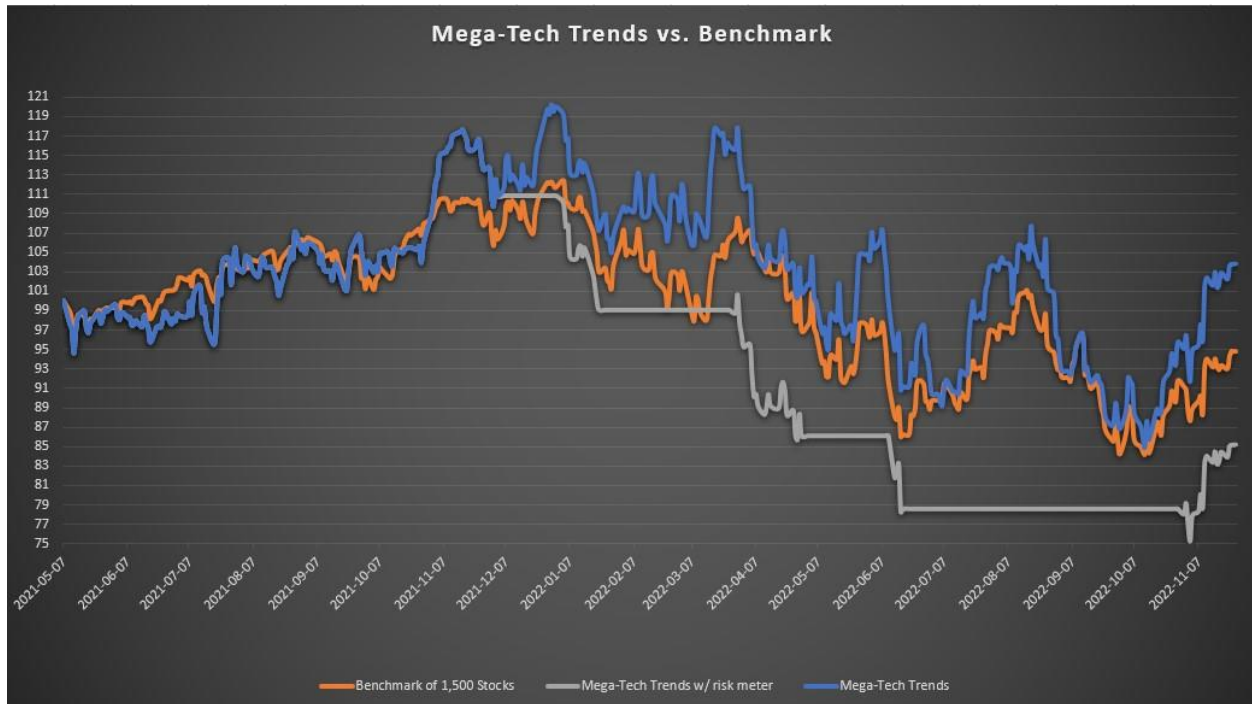


No trades this week (Probably a good thing actually as the model lets the trends run).

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
BELFB	Bel Fuse, Inc.	36.61%	95	Technology
EDAP	EDAP TMS SA	27.25%	80	Healthcare
HCKT	The Hackett Group, Inc.	7.29%	249	Technology
IRMD	IRadimed Corp.	-0.59%	18	Healthcare
IVAC	Intevac, Inc.	17.18%	18	Technology
KNSA	Kiniksa Pharmaceuticals Ltd.	13.42%	18	Healthcare
PERI	Perion Network Ltd.	54.21%	130	Technology
SMLR	Semler Scientific, Inc.	4.88%	18	Healthcare
TCMD	Tactile Systems Technology, Inc.	-1.14%	11	Healthcare
VYGR	Voyager Therapeutics, Inc.	0.36%	11	Healthcare

Mega-Tech Trends



There are three trades this week.

Buy Arlo Technologies, Inc. (NYSE: ARLO), Cirrus Logic, Inc. (Nasdaq: CRUS) and LiveRamp Holdings, Inc. (NYSE: RAMP)

Sell Extreme Networks, Inc. (Nasdaq: EXTR), Cohu, Inc. (Nasdaq: COHU), NetApp, Inc. (Nasdaq: NTAP)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
AEIS	Advanced Energy Industries, Inc.	9.57%		Technology
ARLO	Arlo Technologies, Inc.	0.00%	NEW	Technology
BDC	Belden, Inc.	6.67%	18	Technology
BHE	Benchmark Electronics, Inc.	1.60%	25	Technology
CDW	CDW Corp.	17.69%	60	Technology
CRUS	Cirrus Logic, Inc.	0.00%	NEW	Technology
JBL	Jabil, Inc.	19.03%	116	Technology
PLAB	Photronics, Inc.	20.43%	46	Technology
RAMP	LiveRamp Holdings, Inc.	0.00%	NEW	Technology
SANM	Sanmina Corp.	33.39%	109	Technology

Large Cap Leaders



There are three trades this week.

Buy Analog Devices, Inc. (Nasdaq: ADI), Keysight Technologies, Inc. (NYSE: KEYS), and Motorola Solutions, Inc. (NYSE: MSI)

Sell AutoDesk, Inc. (Nasdaq: ADSK), Cadence Design (Nasdaq: CDNS), NetApp, Inc. (Nasdaq: NTAP)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ADI	Analog Devices, Inc.	0.00%	NEW	Technology
APH	Amphenol Corp.	2.01%	291	Technology
CDW	CDW Corp.	10.17%	67	Technology
EPAM	EPAM Systems, Inc.	-3.08%	11	Technology
FTNT	Fortinet, Inc.	12.34%	18	Technology
KEYS	Keysight Technologies, Inc.	0.00%	NEW	Technology
KLAC	KLA Corp.	18.20%	25	Technology
MSI	Motorola Solutions, Inc.	0.00%	NEW	Technology
SNPS	Synopsys, Inc.	-8.36%	95	Technology
VRTX	Vertex Pharmaceuticals, Inc.	-0.52%	4	Healthcare

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