



Short and Sweet

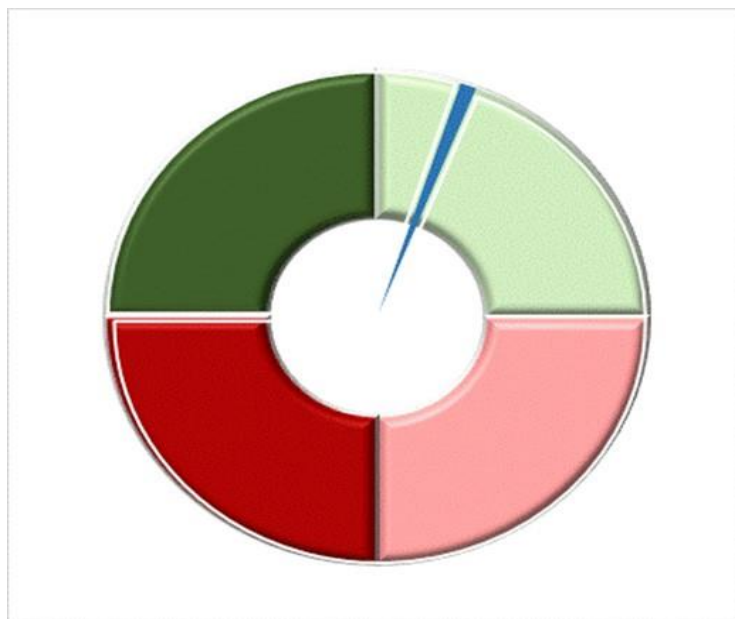
This week's intro is short and sweet.

I am overseas on holiday.

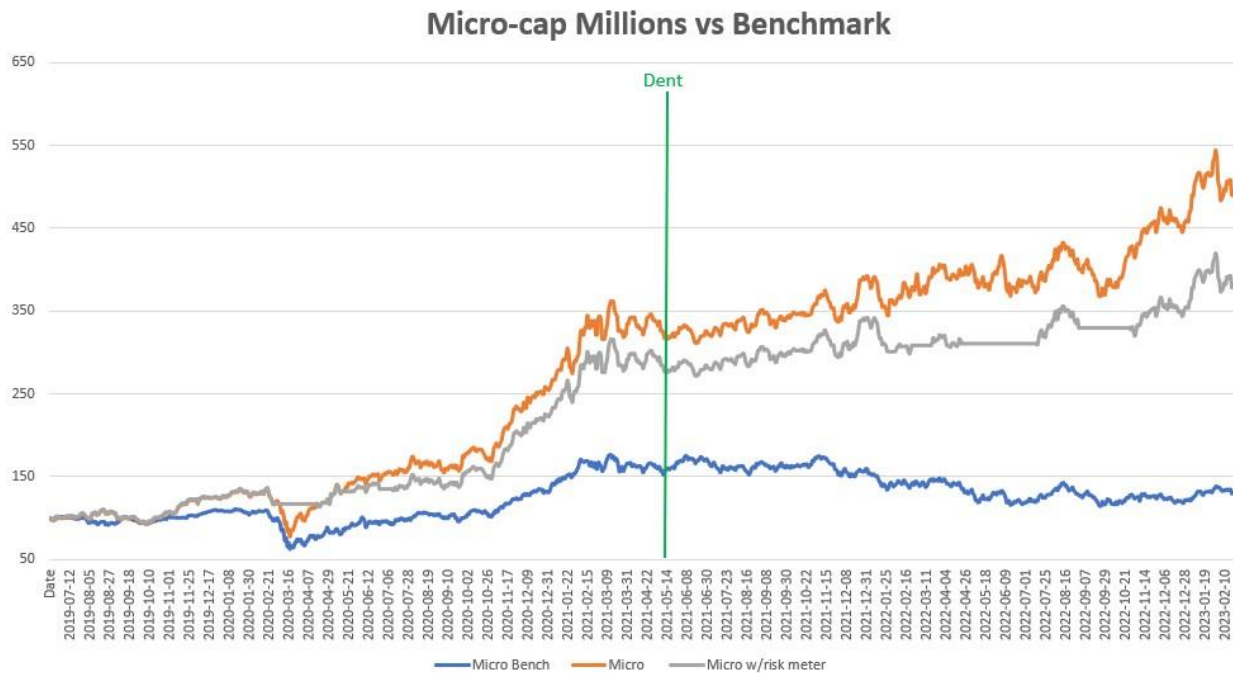
I had not been on a plane in 3 ½ years. As someone who spent half my time on the road for over a decade, I gotta say, flying blows.

Like everything else post COVID, the price has gone up and the quality has gone down.

The *Risk-O-Meter* remains in the "green zone" but I continue to sit on my hands.



Micro-Cap Millions



There are three new trades this week.

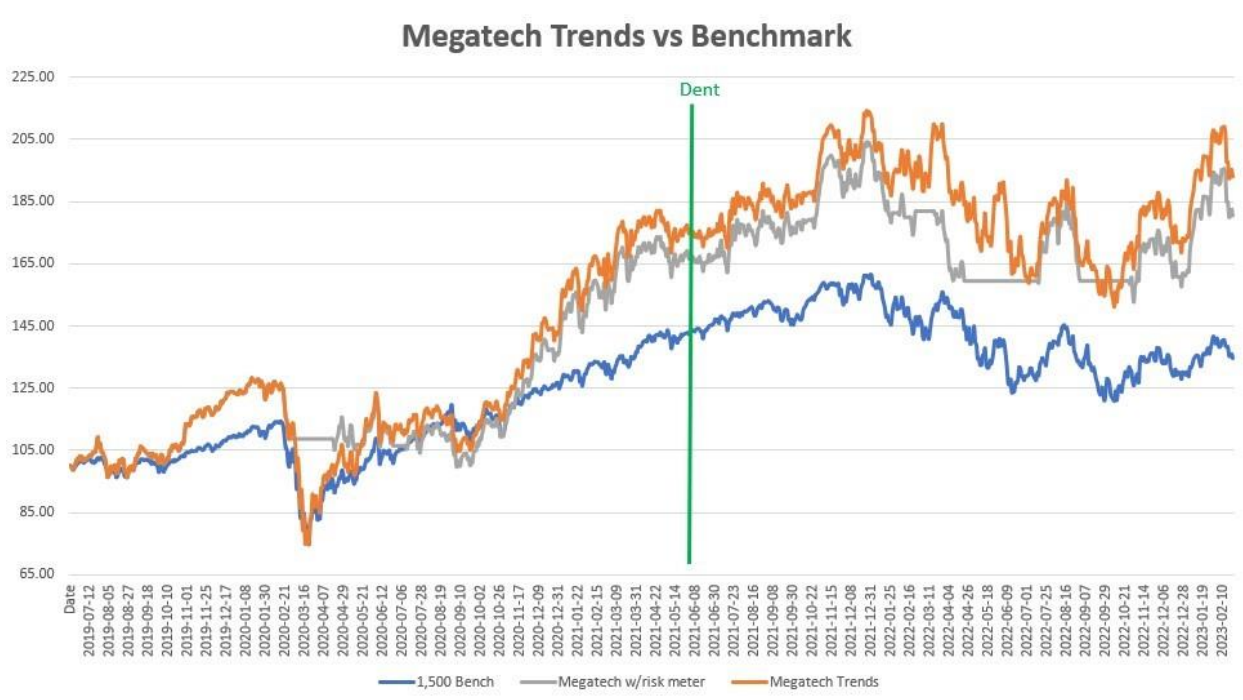
Buy Spok Holdings (Nasdaq: SPOK), Utah Medical (Nasdaq: UTMD), and Universal Security (NYSE: UUU)

Sell Hackett Group (Nasdaq: HKCT), Intervac (Nasdaq: IVAC), Tactile Systems (Nasdaq: TCMD)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
BELFB	Bel Fuse, Inc.	22.03%	186	Technology
DPSI	DecisionPoint Systems, Inc.	-16.81%	46	Technology
EDAP	EDAP TMS SA	10.25%	14	Healthcare
IRMD	IRadimed Corp.	30.64%	109	Healthcare
KMDA	Kamada Ltd.	12.34%	67	Healthcare
KNSA	Kiniksa Pharmaceuticals Ltd.	-6.94%	109	Healthcare
MGIC	Magic Software Enterprises Ltd.	-9.92%	7	Technology
SPOK	Spok Holdings, Inc.	0.00%	NEW	Telecommunications
UTMD	Utah Medical Products, Inc.	0.00%	NEW	Healthcare
UUU	Universal Security Instruments, Inc.	0.00%	NEW	Technology

Mega-Tech Trends



There are three new trades this week.

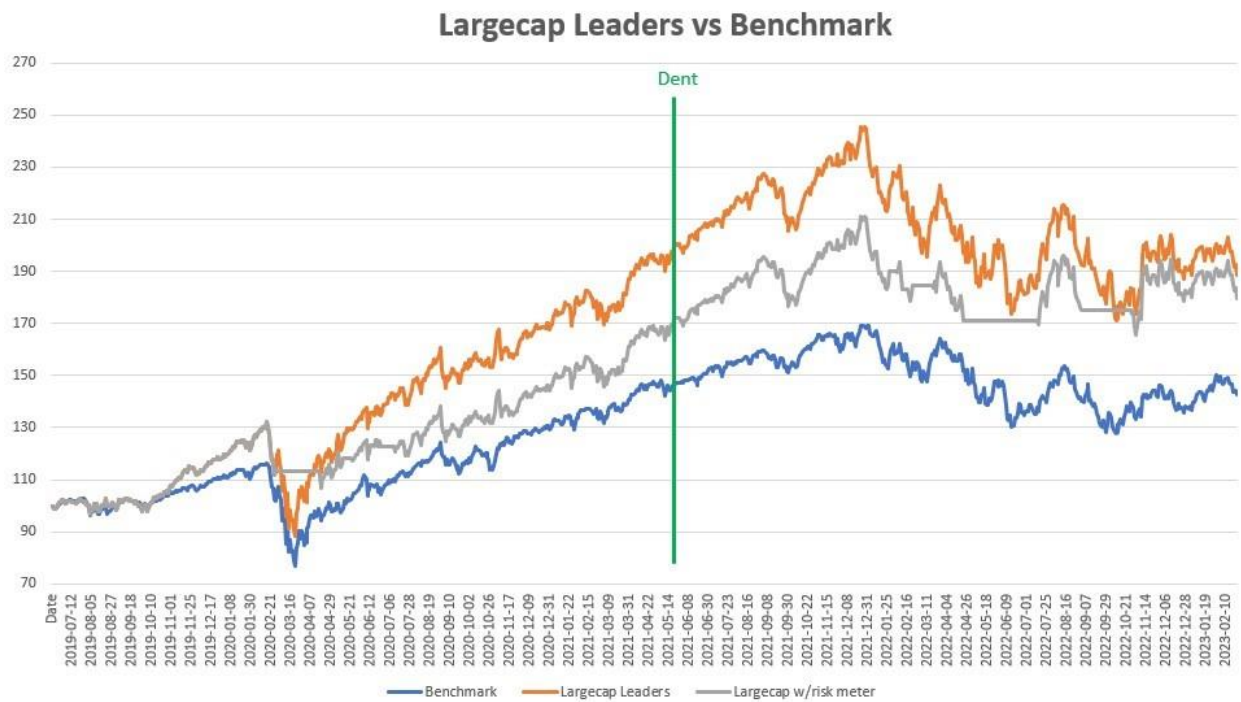
Buy Jabil, Inc. (NYSE: JBL), OraSure Technologies, Inc. (Nasdaq: OSUR), and Shutterstock (NYSE: SSTK)

Sell Universal Electronics (Nasdaq: UEIC), Cars.com, Inc, (NYSE: CARS), ANI Pharma (Nasdaq: ANIP)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ACLS	Axcelis Technologies, Inc.	51.63%	67	Technology
BDC	Belden, Inc.	12.32%	109	Technology
CRUS	Cirrus Logic, Inc.	-0.29%	18	Technology
CSGS	CSG Systems International, Inc.	-7.58%	18	Telecommunications
FN	Fabrinet	-1.66%	14	Technology
JBL	Jabil, Inc.	0.00%	NEW	Technology
OSUR	OraSure Technologies, Inc.	0.00%	NEW	Healthcare
SSTK	Shutterstock, Inc.	0.00%	NEW	Technology
TDC	Teradata Corp.	-2.44%	7	Technology
VIAV	Viavi Solutions, Inc.	-7.72%	18	Technology

Large Cap Leaders



There are no trades this week. Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ADBE	Adobe, Inc.	-12.22%	7	Technology
ADI	Analog Devices, Inc.	7.09%	25	Technology
CSCO	Cisco Systems, Inc.	-2.45%	81	Technology
FDS	FactSet Research Systems, Inc.	0.01%	38	Technology
FTNT	Fortinet, Inc.	-4.12%	7	Technology
KEYS	Keysight Technologies, Inc.	-10.65%	88	Technology
MSI	Motorola Solutions, Inc.	2.09%	18	Technology
NOW	ServiceNow, Inc.	-9.87%	18	Technology
ORCL	Oracle Corp.	1.62%	32	Technology
PAYC	Paycom Software, Inc.	-9.01%	14	Technology

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