



Crazy Week

Unfortunately, I did not have a productive week work-wise. I had to deal with some personal health issues early in the week.

Then I went to Saratoga to attend a horse race in honor of a family friend who passed away this year, as it was important to me to offer my condolences to his loved ones in person.

He was called "Joe".

Joe was one of those rare people you meet that has tremendous charisma and presence.

He commanded any room he walked into.

I remember the moment my dad introduced me to Joe for the first time when I was 15.

My dad had charisma in spades too.

So, spending time with the two of them together created terrific memories. One of the best ski trips I ever had was with Joe in Lake Tahoe many years ago.

Before dinner, cocktails were mandatory. My dad liked to "get his heart started" before dinner. Those times before we sat down to eat were filled with incredible stories and a lot of laughs.

One of the last times I hung out with Joe was at Saratoga. He said, "Hey Jay, let's get out of here. I'm getting my ass kicked. There's this guy named Bobby who cooks food. He wants to have a drink with us at Siro's."

Bobby was Bobby Flay. The most famous chef in the U.S.

Flay, is also an avid horseman.

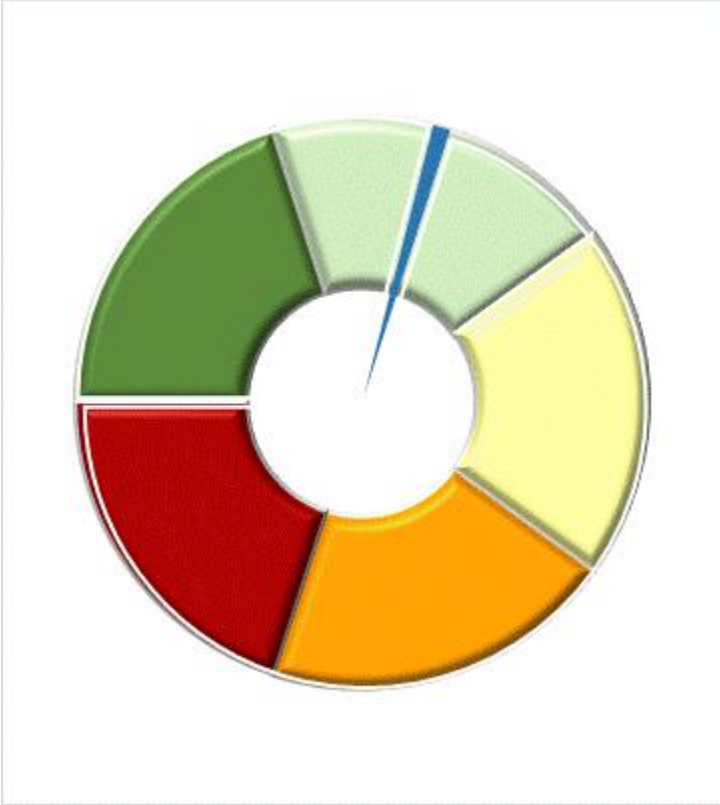
Driving home today, I was smiling to myself, remembering that Bobby Flay was hanging on every word that Joe said over those two drinks together.

The race held in Joe's honor had a tagline that said, "Larger Than Life, Never to be Forgotten."

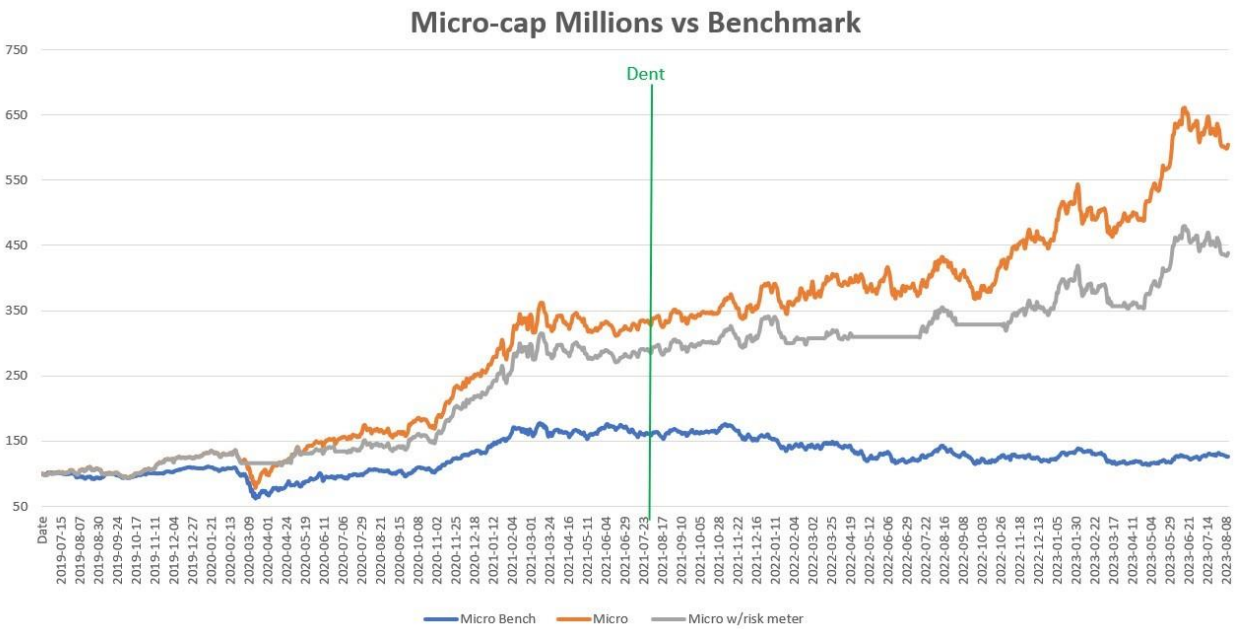
Very fitting.

I'll be back to regularly scheduled programming next issue.

The Risk-O-Meter



Micro-Cap Millions



There is one trade this week.

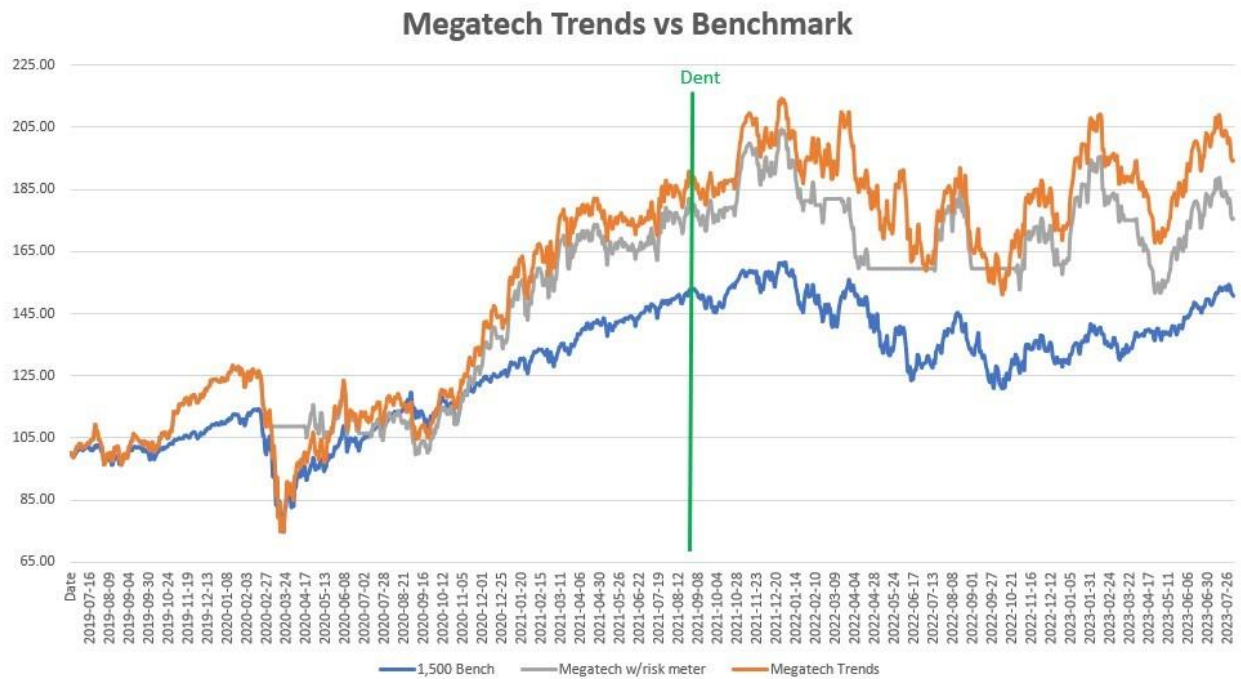
Buy Issuer Direct Corp. (NYSE: ISDR)

Sell Tactile Systems Technology, Inc. (Nasdaq: TCMD)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ALOT	AstroNova, Inc.	-5.34%	60	Technology
CINT	CI&T, Inc. (Brazil)	-17.11%	46	Technology
ELTK	Eltek Ltd.	27.02%	81	Technology
GILT	Gilat Satellite Networks Ltd.	26.32%	88	Technology
ISDR	Issuer Direct Corp.	0.00%	NEW	Technology
ITRN	Ituran Location & Control Ltd.	19.40%	67	Telecommunications
OOMA	Ooma, Inc.	12.21%	73	Technology
SPOK	Spok Holdings, Inc.	53.66%	165	Telecommunications
UTMD	Utah Medical Products, Inc.	9.70%	165	Healthcare
UUU	Universal Security Instruments, Inc.	-2.13%	4	Technology

Mega-Tech Trends



There are two trades this week.

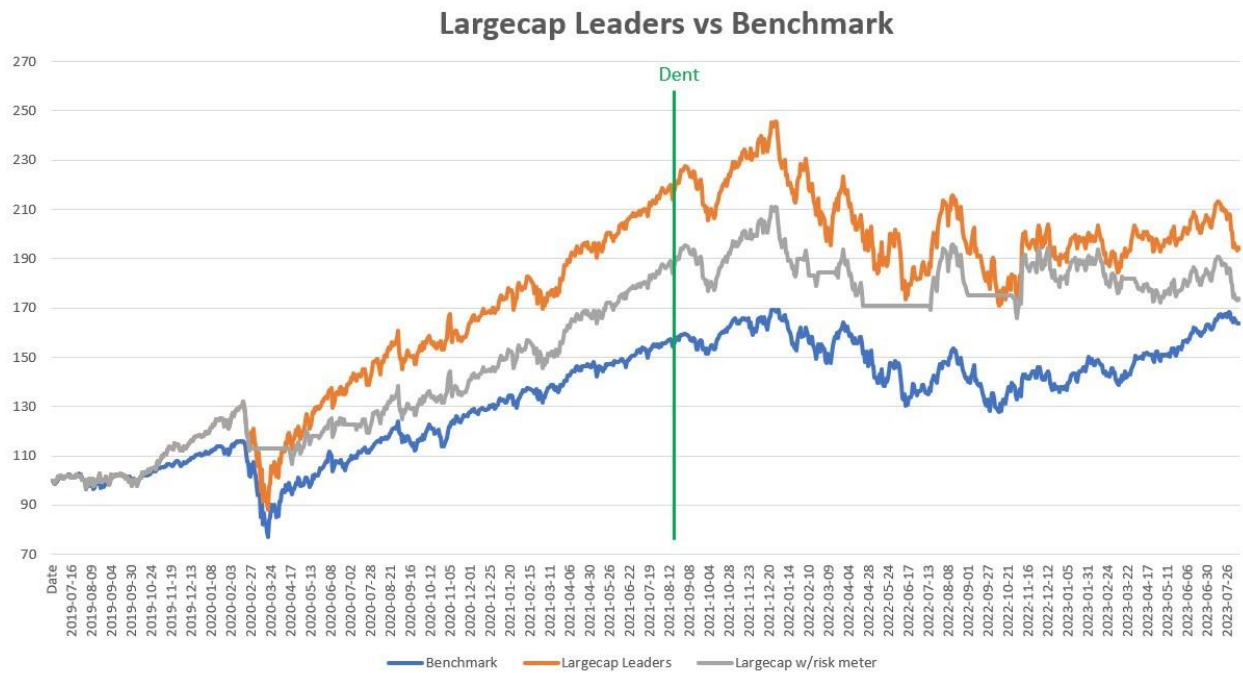
Buy EPAM Systems, Inc. (NYSE: EPAM) and Veeco Instruments, Inc. (Nasdaq: VECO)

Sell NetScout Systems, Inc (Nasdaq: NTCT) and Vanda Pharma, Inc. (Nasdaq: VNDA)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ANIP	ANI Pharmaceuticals, Inc.	21.56%	14	Healthcare
CALX	Calix, Inc.	-16.51%	32	Technology
EPAM	EPAM Systems, Inc.	0.00%	NEW	Technology
INTC	Intel Corp.	-0.71%	4	Technology
OSIS	OSI Systems, Inc.	-2.86%	25	Technology
PLAB	Photronics, Inc.	-10.33%	25	Technology
PLUS	ePlus, Inc.	32.61%	73	Technology
VECO	Veeco Instruments, Inc.	0.00%	NEW	Technology

Large Cap Leaders



There is one trade this week.

Buy Arista Networks, Inc. (NYSE: ANET)

Sell Salesforce, Inc. (NYSE: CRM)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ADBE	Adobe, Inc.	4.78%	32	Technology
ANET	Arista Networks Inc	0.00%	NEW	Technology
CMCSA	Salesforce, Inc.	2.65%	4	Telecommunications
FTNT	Fortinet, Inc.	-23.64%	18	Technology
GOOGL	Alphabet, Inc.	1.13%	4	Technology
KEYS	Keysight Technologies, Inc.	-3.15%	73	Technology
NFLX	Netflix, Inc.	-1.37%	18	Technology
NOW	ServiceNow, Inc.	1.05%	4	Technology
PANW	Palo Alto Networks, Inc.	-9.66%	25	Technology
SYK	Stryker Corp.	-4.16%	52	Healthcare

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