



Remembrance

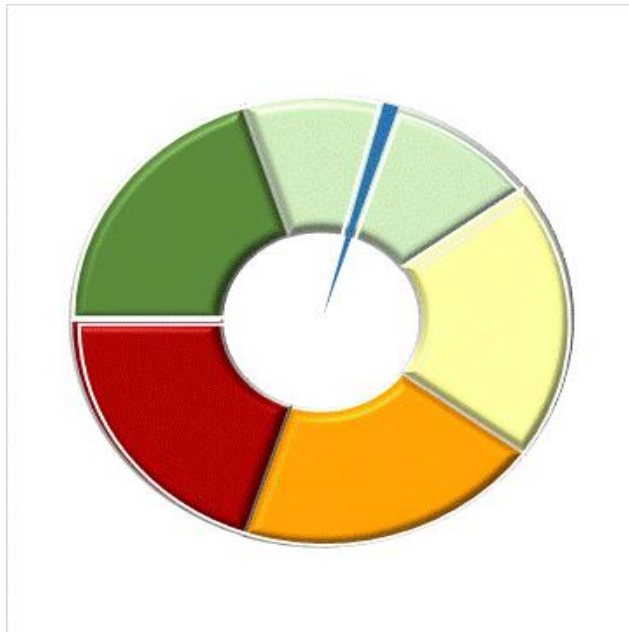
Somber day today. I'm going to keep the intro short this week.

It's one of those days we all will remember where we were.

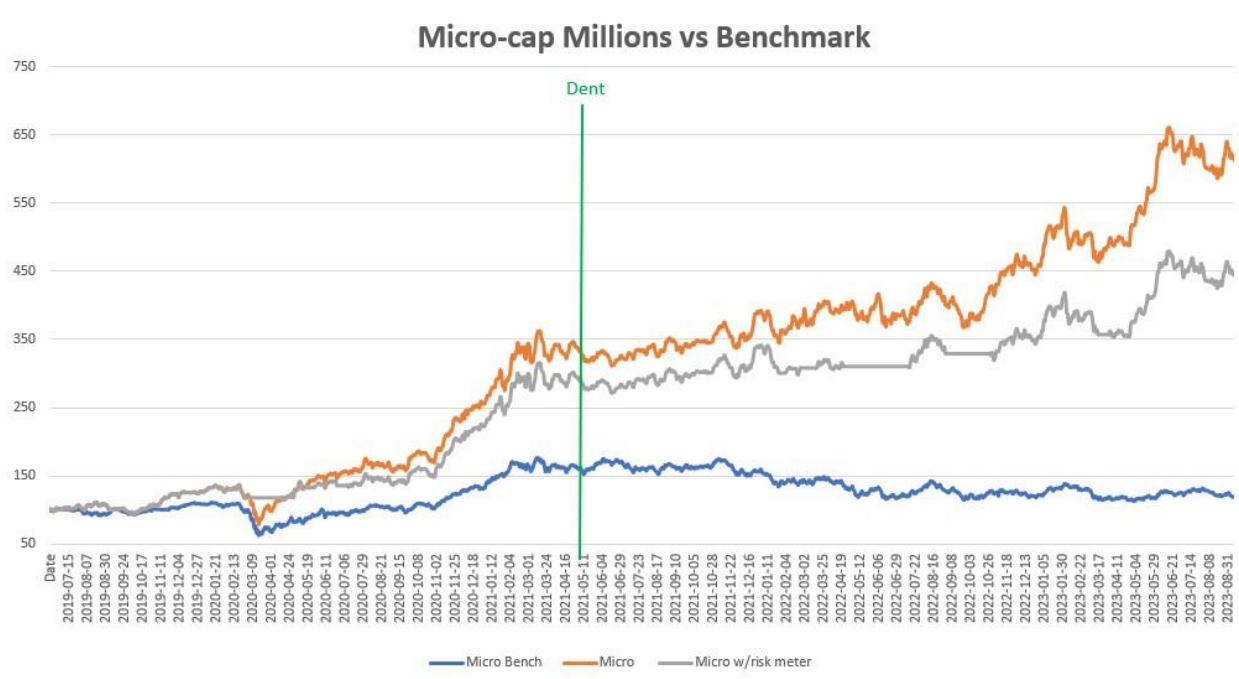
Having worked on Wall Street and then near Washington, DC, on September 11, 2001, it's still surreal in my mind.

May those who perished rest in peace.

The Risk-O-Meter



Micro-Cap Millions



There is one trade this week.

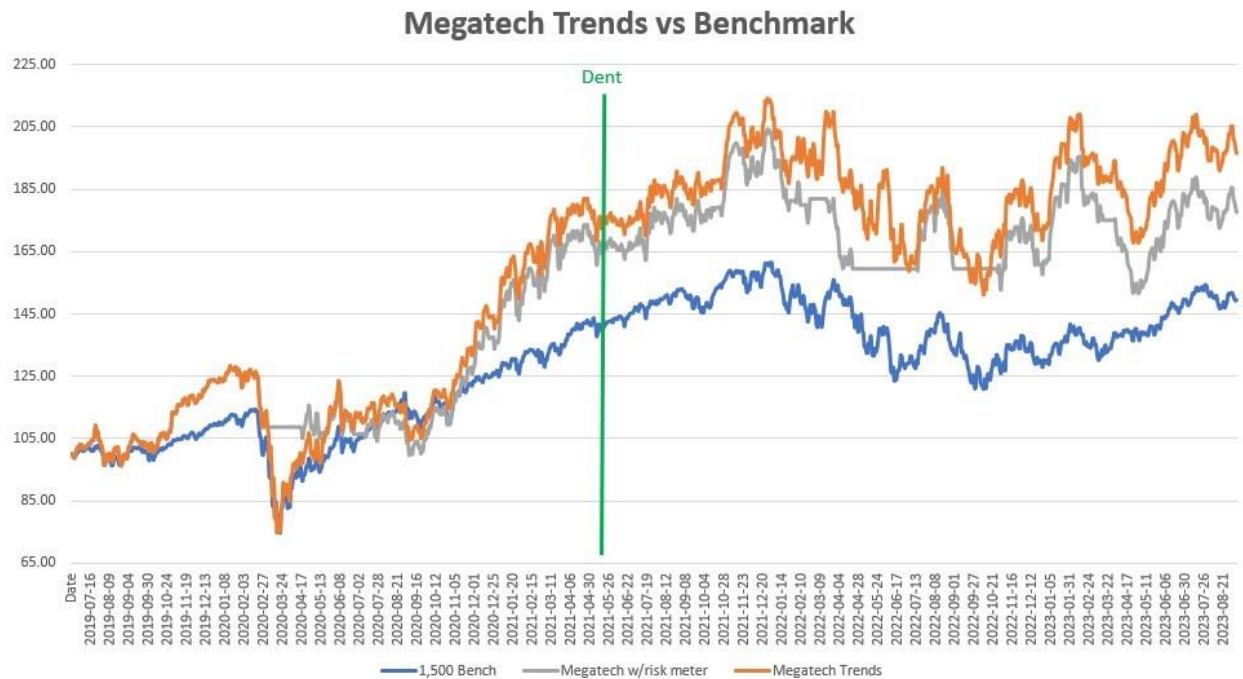
Buy Viant Technology, Inc. (Nasdaq: DSP)

Sell AstroNova, Inc. (Nasdaq: ALOT)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
DPSI	DecisionPoint Systems, Inc.	14.82%	11	Technology
DSP	Viant Technology, Inc.	0.00%	NEW	Technology
DTST	Data Storage Corp.	23.13%	18	Technology
ELTK	Eltek Ltd.	30.49%	109	Technology
GILT	Gilat Satellite Networks Ltd.	16.15%	116	Technology
ISDR	Issuer Direct Corp.	-5.30%	28	Technology
ITRN	Ituran Location & Control Ltd.	25.90%	95	Telecommunications
SMLR	Semler Scientific, Inc.	-0.68%	18	Healthcare
SPOK	Spok Holdings, Inc.	54.52%	193	Telecommunications
UTMD	Utah Medical Products, Inc.	0.83%	193	Healthcare

Mega-Tech Trends



There are three trades this week.

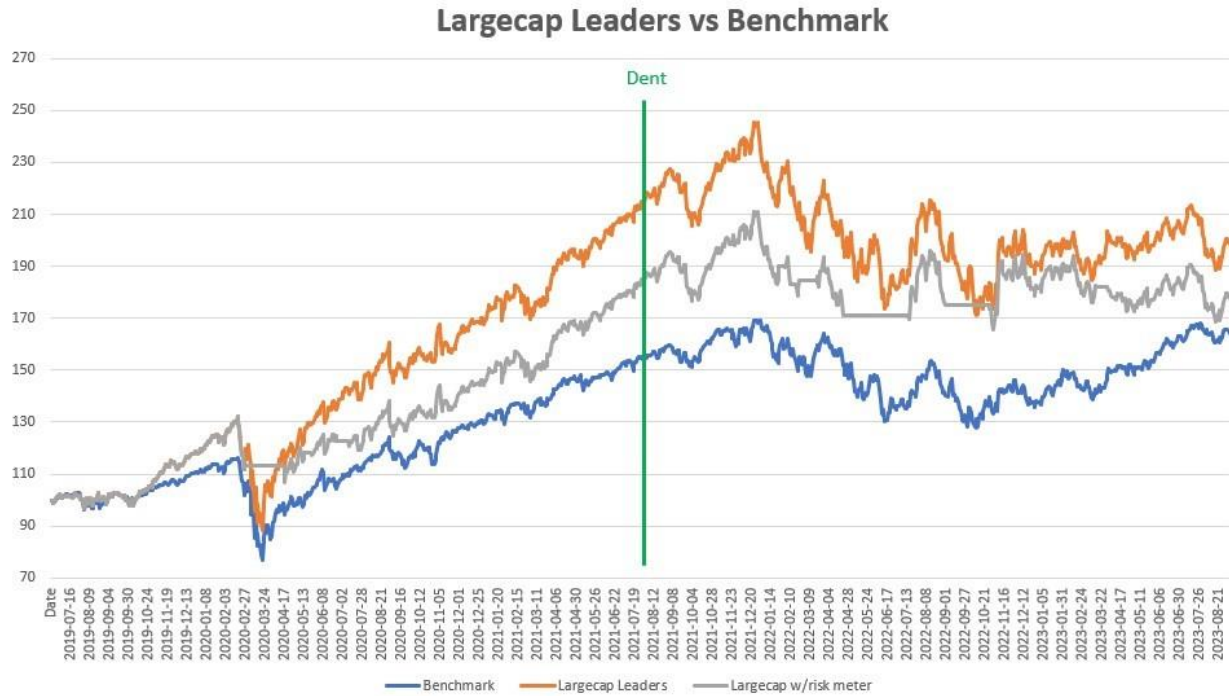
Buy Avnet, Inc. (Nasdaq: AVT), NetApp, Inc. (Nasdaq: NTAP), and Plexus Corp. (Nasdaq: PLXS)

Sell Cargurus, Inc. (Nasdaq: CARG), Photronics, Inc. (Nasdaq: PLAB), and Xperi, Inc. (NYSE: XPER)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ALRM	Alarm.com Holdings, Inc.	-1.43%		3 Technology
ANIP	ANI Pharmaceuticals, Inc.	20.18%		42 Healthcare
AVT	Avnet, Inc.	0.00%	NEW	Technology
BDC	Belden, Inc.	2.71%		3 Technology
CNXN	PC Connection, Inc.	4.07%		11 Technology
CSGS	CSG Systems International, Inc.	-2.78%		3 Telecommunications
NTAP	NetApp, Inc.	0.00%	NEW	Technology
PLUS	ePlus, Inc.	29.17%		101 Technology
PLXS	Plexus Corp.	0.00%	NEW	Technology
SCSC	ScanSource, Inc.	-8.19%		3 Technology

Large Cap Leaders



There is trade this week.

Buy Oracle Corp. (NYSE: ORCL)

Sell Comcast Corp. (Nasdaq: CMCSA)

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ADBE	Adobe, Inc.	15.47%	60	Technology
ALGN	Align Technology, Inc.	-11.37%	3	Healthcare
ANET	Arista Networks, Inc.	12.31%	28	Technology
BIO	Bio-Rad Laboratories, Inc.	-9.30%	3	Healthcare
BSX	Boston Scientific Corp.	7.33%	18	Healthcare
CRM	Salesforce, Inc.	7.30%	11	Technology
MSI	Motorola Solutions, Inc.	1.74%	18	Technology
NFLX	Netflix, Inc.	0.66%	3	Technology
ORCL	Oracle Corp.	0.00%	NEW	Technology
SYK	Stryker Corp.	-1.63%	80	Healthcare

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