



## Merry Christmas

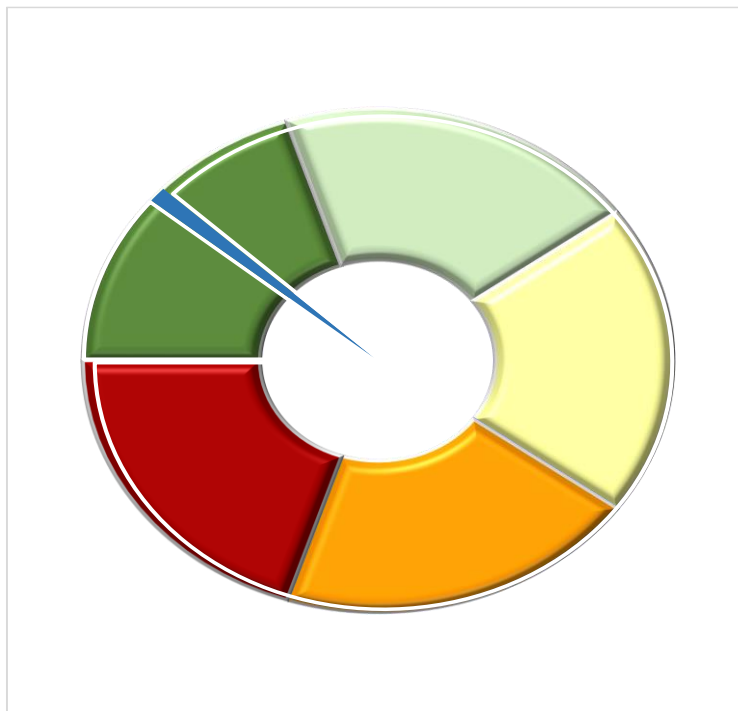
No intro this week as I celebrate the Christmas holiday with my family. Christmas Eve is at my home each year. It's a big blowout with 25-30 people.

I'm looking forward to it today (as I write this).

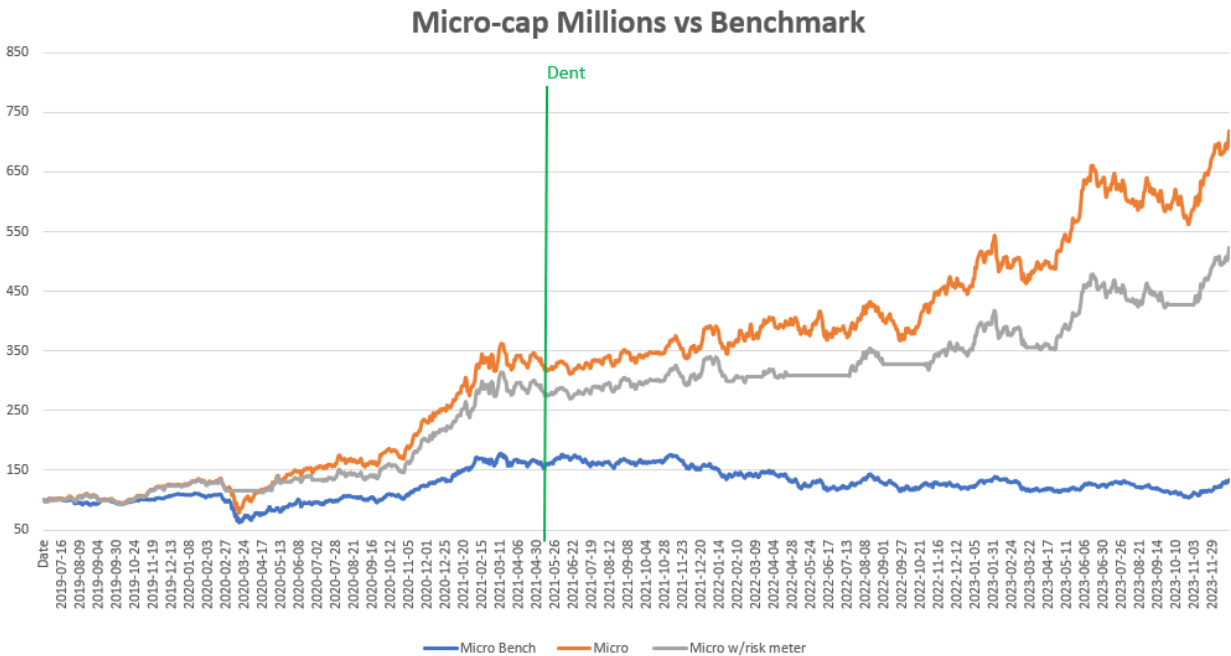
Merry Christmas!

If you don't celebrate Christmas, I hope your Chinese takeout hits the spot and fills your belly! Have a wonderful day, regardless!

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



# Micro-Cap Millions



There is one trade this week.

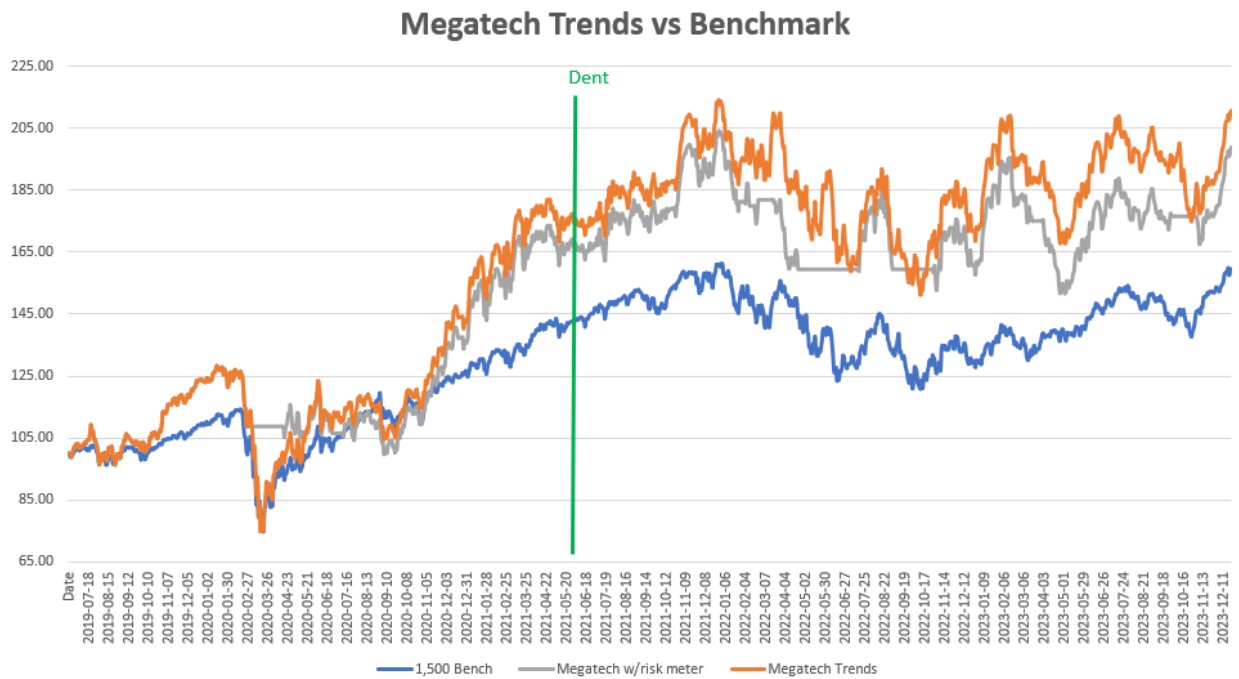
**Buy Nephros (Nasdaq: NEPH)**

**Sell RCM Technologies (Nasdaq: RCMT)**

Here is the current portfolio:

| Ticker | Name                           | Return | Days Held | Sector             |
|--------|--------------------------------|--------|-----------|--------------------|
| CXDO   | Crexendo, Inc.                 | 29.97% | 4         | Technology         |
| DSP    | Viant Technology, Inc.         | 44.93% | 53        | Technology         |
| DTST   | Data Storage Corp.             | 9.33%  | 123       | Technology         |
| EGAN   | eGain Corp.                    | 26.48% | 39        | Technology         |
| ELTK   | Eltek Ltd.                     | -4.97% | 4         | Technology         |
| GILT   | Gilat Satellite Networks Ltd.  | 13.43% | 221       | Technology         |
| ITRN   | Ituran Location & Control Ltd. | 15.98% | 200       | Telecommunications |
| MIXT   | MiX Telematics Ltd.            | 52.35% | 39        | Technology         |
| MTLS   | Materialise NV                 | 20.43% | 39        | Technology         |
| NEPH   | Nephros                        | 0.00%  | NEW       | Healthcare         |

# Mega-Tech Trends



There are three trades this week.

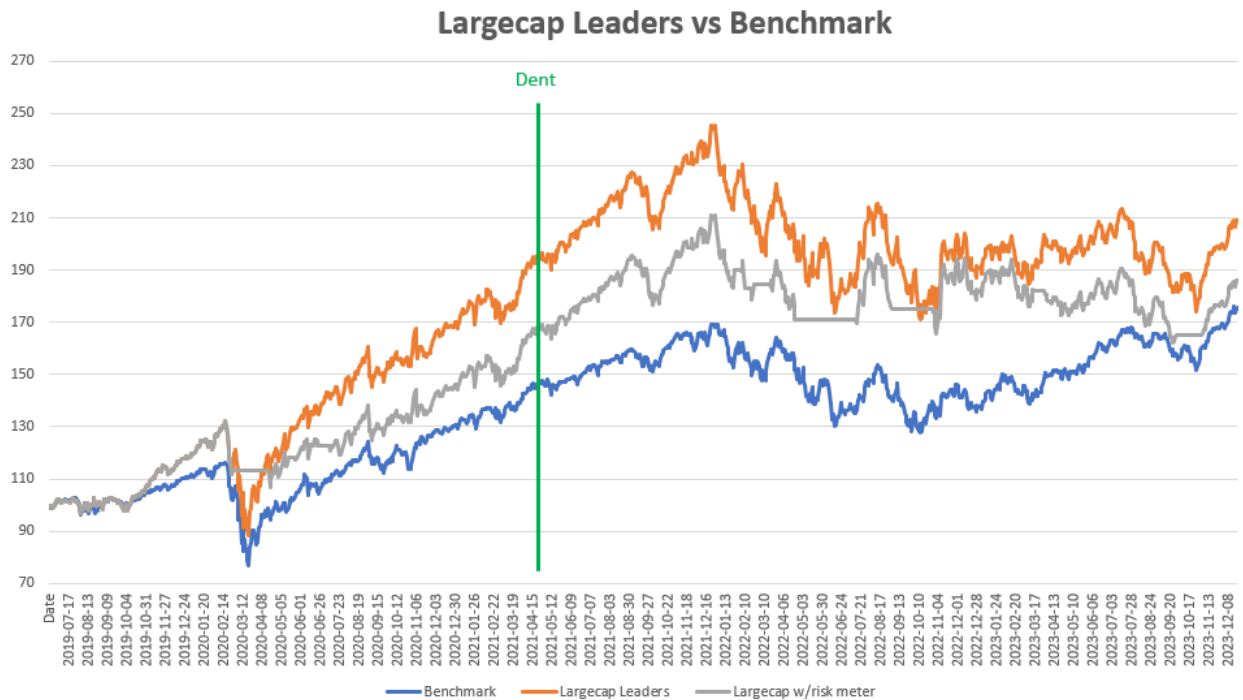
**Buy Amkor Technologies (Nasdaq: AMKR), Benchmark Electronics (NYSE: BHE), Photronics (Nasdaq: PLAB)**

**Sell GoDaddy (NYSE: GDDY), CDW Corp. (Nasdaq: CDW), and ScanSource (Nasdaq: SCSC)**

Here is the current portfolio:

| Ticker | Name                                | Return | Days Held | Sector     |
|--------|-------------------------------------|--------|-----------|------------|
| AMKR   | Amkor Technology, Inc.              | 0.00%  | NEW       | Technology |
| AVT    | Avnet, Inc.                         | 6.19%  | 11        | Technology |
| BHE    | Benchmark Electronics, Inc.         | 0.00%  | NEW       | Technology |
| CALX   | Calix, Inc.                         | 20.15% | 46        | Technology |
| CNXN   | PC Connection, Inc.                 | 14.42% | 46        | Technology |
| DFIN   | Donnelley Financial Solutions, Inc. | 15.50% | 46        | Technology |
| FN     | Fabrinet                            | 12.11% | 32        | Technology |
| PLAB   | Photronics, Inc.                    | 0.00%  | NEW       | Technology |
| PLUS   | ePlus, Inc.                         | 58.84% | 206       | Technology |
| PLXS   | Plexus Corp.                        | 7.12%  | 11        | Technology |

# Large Cap Leaders



There are two trades this week.

**Buy Regeneron (Nasdaq: REGN) and TE Connectivity (NYSE: TEL)**

**Sell CDW (Nasdaq: CDW) and Synopsis (Nasdaq: SNPS)**

Here is the current portfolio:

| Ticker | Name                            | Return | Days Held | Sector     |
|--------|---------------------------------|--------|-----------|------------|
| ANET   | Arista Networks, Inc.           | 12.13% | 46        | Technology |
| APH    | Amphenol Corp.                  | 24.84% | 53        | Technology |
| BSX    | Boston Scientific Corp.         | 1.73%  | 11        | Healthcare |
| CRM    | Salesforce, Inc.                | 6.19%  | 11        | Technology |
| FTNT   | Fortinet, Inc.                  | 13.63% | 11        | Technology |
| MSFT   | Microsoft Corp.                 | 18.16% | 88        | Technology |
| NOW    | ServiceNow, Inc.                | 25.91% | 53        | Technology |
| REGN   | Regeneron Pharmaceuticals, Inc. | 0.00%  | NEW       | Healthcare |
| ROP    | Roper Technologies, Inc.        | 14.15% | 53        | Technology |
| TEL    | TE Connectivity Ltd.            | 0.00%  | NEW       | Technology |

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