



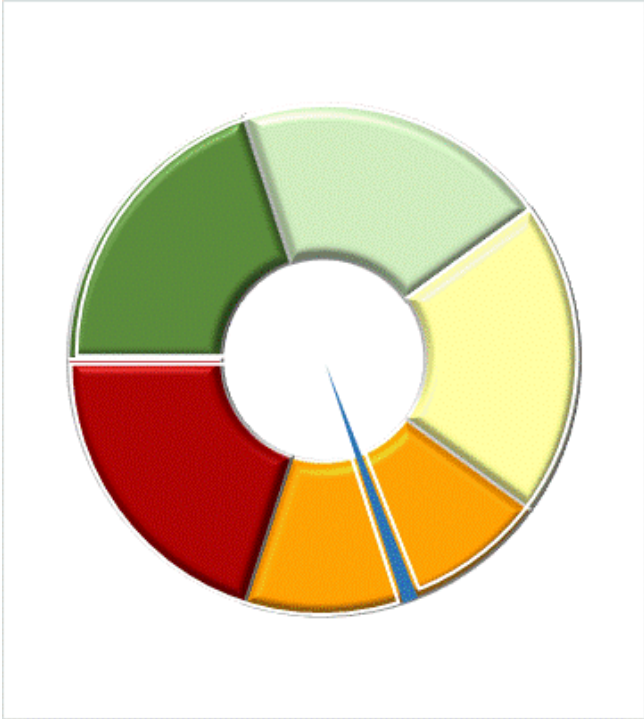
## European Holiday

There is no commentary this week as I'm away.

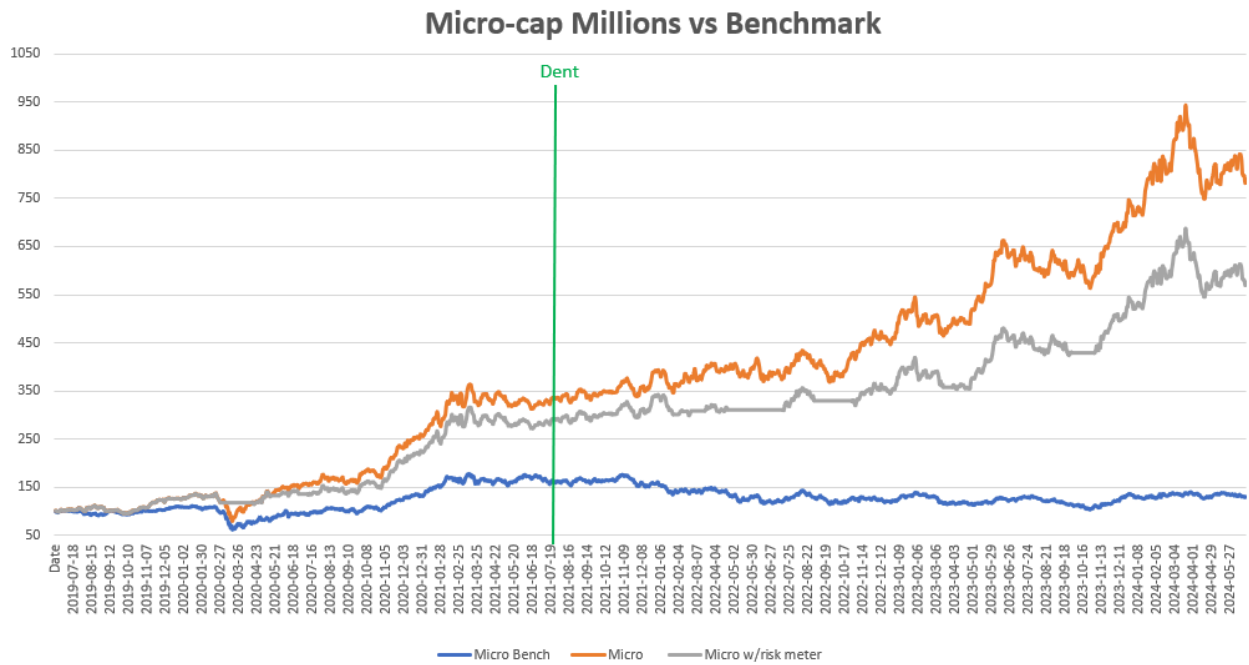
Special thanks to Karen, Stephanie, and Kurtis for helping me out while I'm away so that I did not have to lug a laptop around with me!

I'll be back...next week!





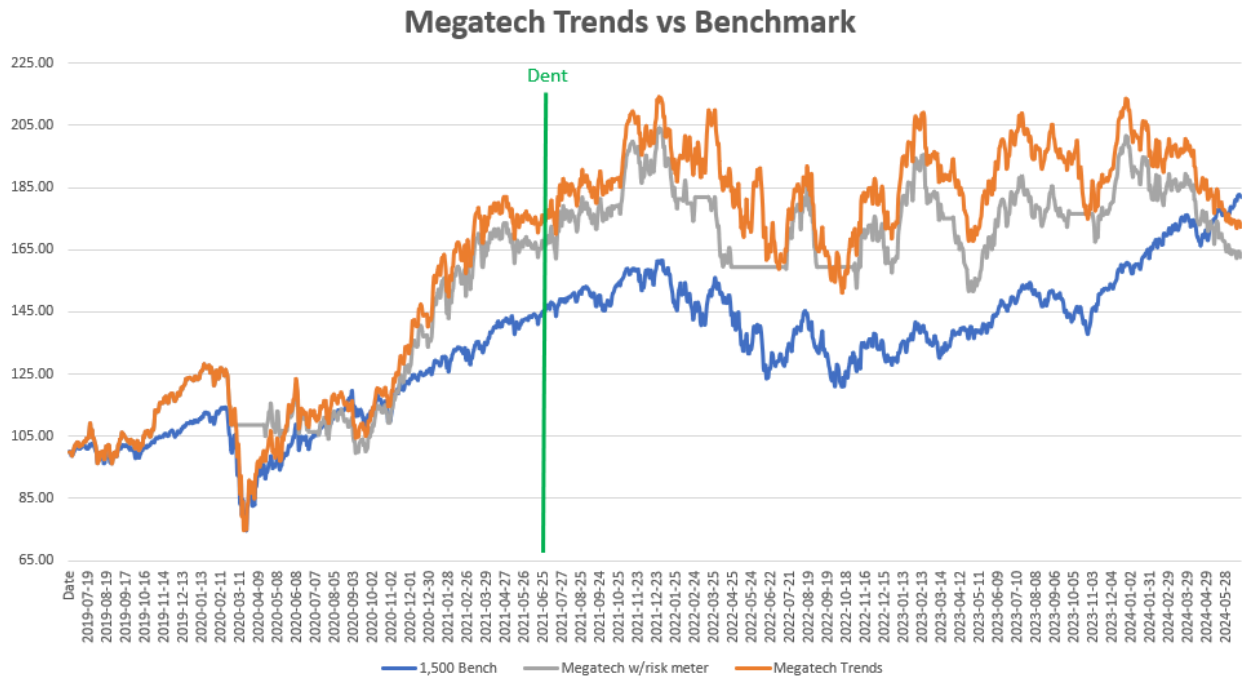
# Micro-Cap Millions



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

Ticker	Name	Return	Days Held	Sector
ACTG	Acacia Research Corp.	-10.39%	18	Technology
ALOT	AstroNova, Inc.	-10.75%	60	Technology
BWAY	Brainsway Ltd.	6.46%	95	Healthcare
DDI	DoubleDown Interactive Co., Ltd.	-15.00%	122	Technology
DSP	Viant Technology, Inc.	82.86%	235	Technology
ELMD	Electromed, Inc.	4.22%	122	Healthcare
IMMR	Immersion Corp.	23.86%	39	Technology
MPTI	M-tron Industries, Inc.	9.32%	39	Technology
RDVT	Red Violet, Inc.	8.39%	39	Technology
WYY	WidePoint Corp.	12.64%	32	Technology

# Mega-Tech Trends



There are 2 trades this week.

**Buy Hewlett Packard Enterprise Co. (NYSE: HPE)**

**Buy Trimble, Inc. (Nasdaq: TRMB)**

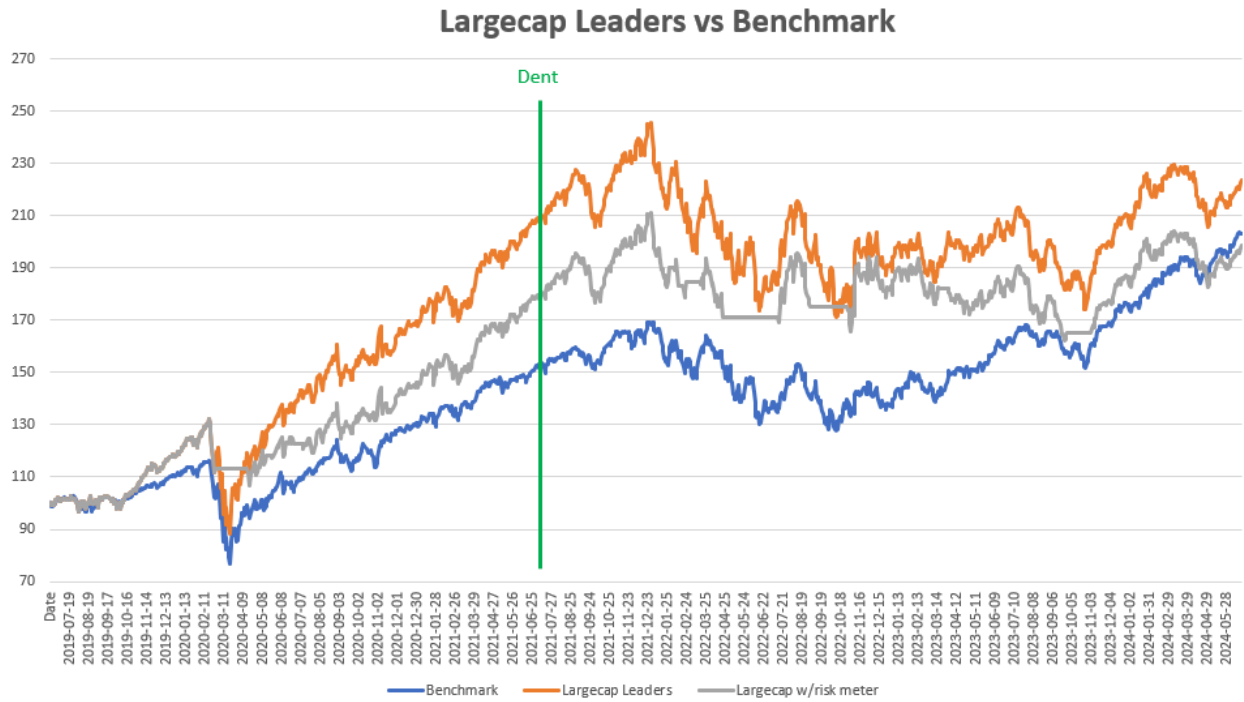
**Sell Yelp (NYSE: YELP)**

**Sell Alkermes plc (Nasdaq: ALKS)**

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ACLS	Axcelis Technologies, Inc.	-0.76%	4	Technology
BDC	Belden, Inc.	0.46%	4	Technology
FN	Fabrinet	2.48%	4	Technology
HPE	Hewlett Packard Enterprise Co.	0.00%	NEW	Technology
INCY	Incyte Corp.	17.60%	46	Healthcare
MKSI	MKS Instruments, Inc.	-1.77%	4	Technology
QRVO	Qorvo, Inc.	1.01%	4	Technology
SCSC	ScanSource, Inc.	12.96%	144	Technology
SNX	TD SYNnex Corp.	10.73%	56	Technology
TRMB	Trimble, Inc.	0.00%	NEW	Technology

# Large Cap Leaders



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

Ticker	Name	Return	Days Held	Sector
AKAM	Akamai Technologies, Inc.	-18.40%	88	Technology
CDW	CDW Corp.	-0.12%	60	Technology
CMCSA	Comcast Corp.	-11.23%	151	Telecommunications
EPAM	EPAM Systems, Inc.	-1.61%	32	Technology
FFIV	F5, Inc.	-5.82%	151	Technology
HPE	Hewlett Packard Enterprise Co.	20.44%	88	Technology
INCY	Incyte Corp.	17.60%	46	Healthcare
MSCI	MSCI, Inc.	4.13%	46	Technology
MSFT	Microsoft Corp.	41.88%	270	Technology
TMUS	T-Mobile US, Inc.	7.76%	32	Telecommunications

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