

Stars Under The Arch - BI National Convention 2010



Dashboard: Arch Stars

Date: 06/08/2010

Company	Symbol	Shares	Price	Value	% of Total	Growth	Proj P/E	Proj Yield	Fin Str	EPS Stab	Qty	PAR
UnitedHealth Group	UNH	3.454	\$30.46	\$105	6.5%	4.2%	13.0	0.0%	91%	85	63.4	17.6%
Genzyme Corp.	GENZ	2.055	\$48.27	\$99	6.1%	8.7%	24.0	0.0%	73%	29	43.0	10.1%
Abbott Labs	ABT	2.103	\$46.23	\$97	6.0%	8.2%	17.0	2.4%	98%	98	81.6	20.2%
St. Jude Medical	STJ	2.678	\$36.24	\$97	6.0%	7.6%	18.0	0.0%	91%	91	74.6	15.4%
Medtronic	MDT	2.552	\$37.71	\$96	5.9%	8.0%	14.0	1.3%	92%	100	79.9	15.6%
Vanguard Total Stock Market	VTSMX	3.67	\$26.17	\$96	5.9%	7.5%	14.3	1.9%	86%	72	68.3	13.0%
Pfizer	PFE	6.566	\$14.52	\$95	5.9%	8.7%	12.0	4.2%	76%	83	66.3	17.2%
Wells Fargo	WFC	3.486	\$27.29	\$95	5.9%	8.5%	14.0	3.0%	72%	59	61.5	15.8%
Weight Watchers	WTW	3.647	\$26.07	\$95	5.9%	7.3%	14.0	1.5%	47%	95	73.5	17.4%
Actuant Corp.	ATU	4.946	\$19.20	\$94	5.9%	9.9%	15.0	0.1%	18%	80	55.3	11.8%
Lowe's	LOW	4.04	\$23.39	\$94	5.8%	6.8%	17.0	1.2%	82%	81	67.6	17.6%
Energizer Holdings	ENR	1.78	\$53.05	\$94	5.8%	2.5%	15.0	0.0%	61%	81	55.0	16.2%
General Electric	GE	6.116	\$15.41	\$94	5.8%	2.0%	16.0	1.5%	80%	84	62.0	14.5%
Zimmer Holdings	ZMH	1.788	\$52.66	\$94	5.8%	4.9%	18.0	0.0%	85%	81	70.9	15.4%
First Solar, Inc. (b)	FSLR	0.89	\$104.98	\$93	5.8%	15.7%	22.0	0.0%	94%	14	56.9	11.8%
Intl Speedway	ISCA	3.586	\$25.88	\$92	5.7%	6.2%	16.0	0.4%	54%	85	69.1	13.9%
Transocean Inc.	RIG	1.761	\$49.17	\$86	5.3%	12.8%	9.0	0.0%	82%	26	54.1	25.4%
Totals & Averages				\$1,621	100.0%	7.6%	15.8	1.0%	75%	73	64.9	15.8%

Screening Results (6/8/2010). This list of companies is the result of screening for 5-star stocks as rated by Morningstar (a total of 66 stocks) and then ranking them by price-to-fair value ratio according to Standard & Poor's. The top sixteen are displayed. The value reflects \$100 invested on 5/31/2010. The embedded benchmark is VTSMX. Growth: Sales Growth Forecast PAR: Projected Annual Return Qty: Rating based on relative growth and profitability, financial strength and EPS stability. This is a published dashboard and can be accessed at: <http://www.manifestinvesting.com/dashboard/19107>

by Mark Robertson
 Founder & Managing Partner
 Manifest Investing LLC

The premise is pretty simple. The S&P 500 has been stuck in the mud for over ten years. The fundamentals at several of the S&P 500 have steadily improved, resulting in their appearance on this list.

S&P Strong Buys: Medtronic (MDT), Nokia (NOK), Exxon Mobil (XOM), Rio Tinto (RTP), Applied Materials (AMAT). The best of the rest (4 stars from S&P): Johnson & Johnson (JNJ), Novartis (NVS), 3M Company (MMM) and Exelon (EXC).



If nothing else, with the median PAR for our universe of stocks near multi-decade average conditions and potentially headed lower, there's quite a bit of defense on this list.

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