

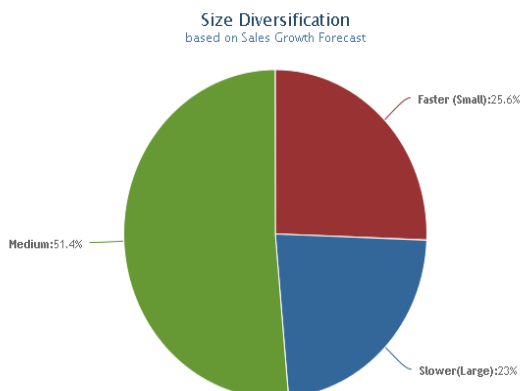
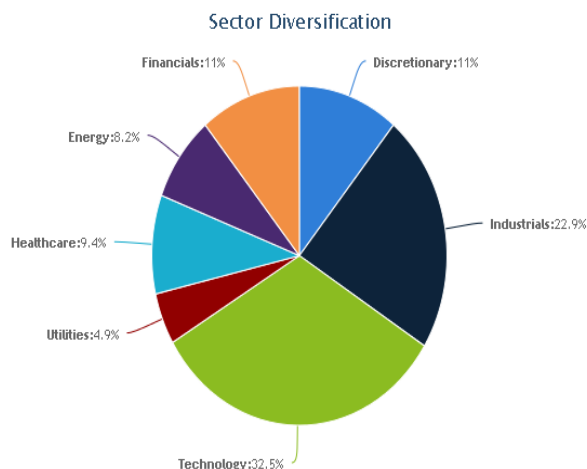
# 2015 CINMIC GROWTH DIVERSIFICATION TABLE (based on TTM Sales Growth)

| March 3/20/2015  | Sales Growth > 15% |       |           | Sales Growth 10 to 15% |       |          | Sales Growth 7 to 10% |       |          | Sales Growth < 7% |       |           | Ttl \$/Pr Sector | % of Portfolio | S&P 500 9/15/14 |
|--|--------------------|-------|-----------|------------------------|-------|----------|-----------------------|-------|----------|-------------------|-------|-----------|------------------|----------------|-----------------|
| SECTOR: Industries   | Ticker             | Sales | \$ Amt.   | Ticker                 | Sales | \$ Amt.  | Ticker                | Sales | \$ Amt.  | Ticker            | Sales | \$ Amt.   |                  |                |                 |
| <b>BASIC MATERIALS:</b> Chemicals; Farm; Forest & Paper Products; Mining & Metals - Aluminum; Nonferrous Metals & Steel; Coal; Precious Metals   |                    |       |           |                        |       |          |                       |       |          |                   |       |           | \$ -             | 0.0%           | 3.5%            |
| <b>CONSUMER CYCLICAL:</b> Media; Specialty Retail; Hotel, Restaurants & Leisure; Multi Line Retail; Household Durables; Textiles, Apparel & Luxury Goods; Internet & Catalog Retail, Autos; Auto Componets; Div.Consumer Svcs; Leisure Equipment & Products; Distributors; Education Services                  | LKQ                | M     | \$ 10,994 |                        |       |          |                       |       |          | BBBY              | L     | \$ 4,492  | \$ 15,485.70     | 10.9%          | 11.9%           |
| <b>CONSUMER DEFENSIVE:</b> Beverages (Alcoholic & Soft Drink) Food Processing; Food Wholesalers & Retailers (Grocery); Hypermarkets & Super centers; Household Products (nondurables); Drug Retailing, Co; Tobacco; Toiletries/Cosmetics   |                    |       |           |                        |       |          |                       |       |          |                   |       |           | \$ -             | 0.0%           | 9.5%            |
| <b>ENERGY:</b> Coal, Oilfield Services & Equipment; Petroleum (Integrated); Petroleum (Producing;); Natural Gas; Wind; Solar; Nuclear  |                    |       |           |                        |       |          |                       |       |          | SLB               | L     | \$ 11,532 | \$ 11,532        | 8.1%           | 10.0%           |
| <b>FINANCIALS and REAL ESTATE:</b> Banks; Savings & Loans; Financial Services; Insurance; Real Estate Investment   | TROW               | M     | \$ 15,538 |                        |       |          |                       |       |          |                   |       |           | \$ 15,538        | 10.9%          | 16.3%           |
| <b>HEALTHCARE:</b> Healthcare Equipment & Services- (Healthcare providers, Medical equipment, Medical supplies) Pharmaceuticals & Biotechnology- (Research,Development, Production & Marketing of product)   |                    |       |           |                        |       |          | NVO                   | L     | \$ 6,191 | VAR               | M     | \$ 7,088  | \$ 13,280        | 9.3%           | 13.7%           |
| <b>INDUSTRIALS:</b> Aerospace/Defense; Cement & Aggregates; Construction, Electrical Equip; Electrons; Human Resources; Industrial Equip; & Svcs; Information Svcs.; Metal Fab.; Office Equip & Sup.; Packing & Containers; Precision Instr.; Trucking &Trans Leasing; Machinery, Railroad, Air, & Ship Trans. | SRCL               | M     | \$ 1,398  |                        |       |          |                       |       |          | DHR               | L     | \$ 9,587  | \$ 32,208        | 22.6%          | 10.3%           |
|  | trn                | m     |           | FAST                   | M     | \$ 5,711 |                       |       |          | PCP               | M     | \$ 4,203  |                  |                |                 |
|  |                    |       |           |                        |       |          |                       |       |          |                   |       |           |                  |                |                 |
|  |                    |       |           |                        |       |          |                       |       |          | CHROW             | L     | \$ 11,310 |                  |                |                 |
| <b>TECHNOLOGY:</b> Computer & Peripherals; Computer Software & Services.; E-Commerce; Industrial Technology; Office Equip.; Internet Services; Semiconductor & Equipment   | SWI                | S     | \$ 7,566  |                        |       |          |                       |       |          | ORCL              | L     | \$ 8,216  | \$ 45,772        | 32.2%          | 19.4%           |
|  | OLED               | S     | \$ 7,774  |                        |       |          |                       |       |          | QCOM              | L     | \$ 12,607 |                  |                |                 |
|  | CTSH               | L     | \$ 9,609  |                        |       |          |                       |       |          |                   |       |           |                  |                |                 |
| <b>COMMUNICATION SERVICES:</b> Broadcasting &TV Cable operations; Communication Equipment; Integrated Telecom Services; Wireless Networking  |                    |       |           |                        |       |          |                       |       |          |                   |       |           | \$ -             | 0.0%           | 2.4%            |
| <b>UTILITIES:</b> Utilities & Distribution - Electric; Natural Gas; Water; Nuclear; Solar; Wind  | ITC                | S     | \$ 6,845  |                        |       |          |                       |       |          |                   |       |           | \$ 6,845         | 4.8%           | 3.0%            |
| <b>CASH IN PORTFOLIO:</b>  |                    |       |           |                        |       |          |                       |       |          |                   |       |           | \$ 1,567         | 1.1%           |                 |
| <b>TOTALS FOR COLUMN</b>   | \$ 59,723          |       |           | \$ 5,711               |       |          | \$ 6,191              |       |          | \$ 69,035         |       |           | \$ 142,227       | 100.0%         | 100.0%          |
| <b>% in relationship to Total Portfolio</b>  | 42.0%              |       |           | 4.0%                   |       |          | 4.4%                  |       |          | 48.5%             |       |           | 100%             |                |                 |
| <b>Suggested Diversification</b>   | 25.0%              |       |           | 50.0%                  |       |          | 25.0%                 |       |          |                   |       |           |                  |                |                 |
| <b>Earnings Growth Expected</b>  | >15%               |       |           | 10-15%                 |       |          | 7-10%                 |       |          | <7%               |       |           |                  |                |                 |

\*SIZE: S - revenues below 1B; M - revenues 1B to 10B; L - revenues over 10B

\*Red bold tickers are on watch list.

## MANIFEST INVESTING DIVERSIFICATION PIE CHARTS:



### INDUSTRIES, IN ORDER OF TIMELINESS RANK\*

Arrow (▲▼) before name indicates that a **significant change in Rank** has occurred since the preceding week.

|                           |                           |                             |                           |
|---------------------------|---------------------------|-----------------------------|---------------------------|
| 1 Railroad                | 26 Financial Svcs. (Div.) | 51▼ Public/Private Equity   | 76 Wireless Networking    |
| 2 Trucking                | 27 Aerospace/Defense      | 52 Restaurant               | 77 Semiconductor          |
| 3 Air Transport           | 28 Retail/Wholesale Food  | 53 IT Services              | 78 Advertising            |
| 4 Chemical (Diversified)  | 29▲ Insurance (Life)      | 54 Electric Util. (Central) | 79 Office Equip/Supplies  |
| 5 Auto Parts              | 30▼ Reinsurance           | 55 Retail Store             | 80 Household Products     |
| 6 Retail Automotive       | 31 Securities Brokerage   | 56▼ Hotel/Gaming            | 81 Power                  |
| 7 Chemical (Specialty)    | 32 Paper/Forest Products  | 57 Beverage                 | 82 Med Supp Invasive      |
| 8 Cable TV                | 33 Food Processing        | 58 Precision Instrument     | 83 Med Supp Non-Invasive  |
| 9 Electric Utility (West) | 34 Engineering & Const    | 59 Metal Fabricating        | 84 Computer Software      |
| 10 Packaging & Container  | 35 Petroleum (Producing)  | 60 Water Utility            | 85 E-Commerce             |
| 11 Apparel                | 36 Furn/Home Furnishings  | 61 Semiconductor Equip      | 86 Telecom. Equipment     |
| 12▲ Automotive            | 37▲ Information Services  | 62 Foreign Electronics      | 87 Bank (Midwest)         |
| 13 Diversified Co.        | 38 Industrial Services    | 63▲ Oil/Gas Distribution    | 88 Healthcare Information |
| 14 Telecom. Services      | 39 Steel                  | 64 Drug                     | 89 Homebuilding           |
| 15 Environmental          | 40 Retail (Hardlines)     | 65 Recreation               | 90 Biotechnology          |
| 16 Machinery              | 41 Natural Gas (Div.)     | 66 Tobacco                  | 91 R.E.I.T.               |
| 17 Electronics            | 42 Building Materials     | 67 Electric Utility (East)  | 92 Human Resources        |
| 18 Medical Services       | 43 Computers/Peripherals  | 68 Insurance (Prop/Cas.)    | 93 Toiletries/Cosmetics   |
| 19 Petroleum (Integrated) | 44 Pharmacy Services      | 69 Pipeline MLPs            | 94 Precious Metals        |
| 20 Maritime               | 45 Electrical Equipment   | 70 Bank                     | 95 Thrift                 |
| 21 Oilfield Svcs/Equip.   | 46 Funeral Services       | 71 Retail (Softlines)       | 96 Entertainment Tech     |
| 22 Chemical (Basic)       | 47 Metals & Mining (Div.) | 72 Telecom. Utility         | 97 Educational Services   |
| 23 Entertainment          | 48 Newspaper              | 73 Natural Gas Utility      |                           |
| 24 Heavy Truck & Equip    | 49 Publishing             | 74 Coal                     |                           |
| 25 Shoe                   | 50 Retail Building Supply | 75 Internet                 |                           |

\*Based on the Timeliness™ ranks of the stocks in the industry

### NOTES ON VALUE LINE TIMELINESS RANK CHANGES:

Companies CinMic has invested in are in the following industries: Auto Parts, Oilfields Services/ Equip., Diversified Co. Retail (Hardlines), Environmental, Industrial, Financial, Electrical Equipment, Electrical Util. , Drug, It Services, Telecom Equipment , Med Supp Invasive and computer Software