

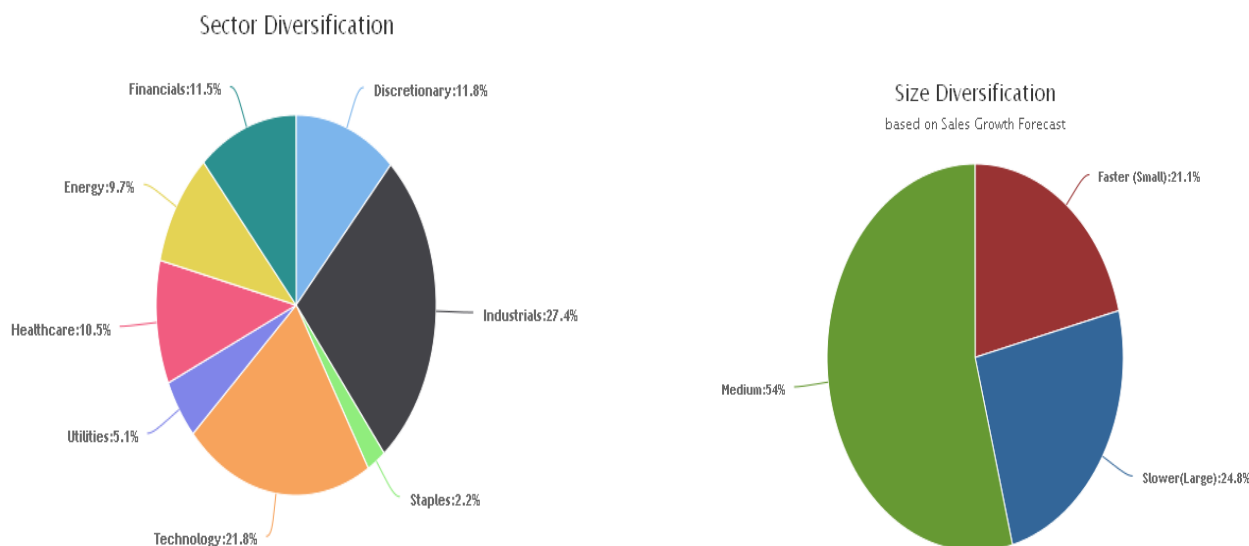
# 2015 CINMIC GROWTH DIVERSIFICATION TABLE (based on TTM Sales Growth)

April 4/17/2015	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	\$ 11,349							BBBY	L	\$ 4,288	\$ 15,636.60	11.0%	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	\$ 13,000	\$ 13,000	9.1%	10.0%
<b>FINANCIALS and REAL ESTATE:</b> Banks; Savings & Loans; Financial Services; Insurance; Real Estate Investment	TROW	M	\$ 15,248										\$ 15,248	10.7%	16.3%
<b>HEALTHCARE:</b> Healthcare Equipment & Services- (Healthcare providers, Medical equipment, Medical supplies) Pharmaceuticals & Biotechnology- (Research,Development, Production & Marketing of product)	CTRX	S	\$ 2,963							VAR	M	\$ 7,034	\$ 16,842	11.8%	13.7%
							NVO	L	\$ 6,846						
<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	\$ 1,381							DHR	L	\$ 9,264	\$ 36,079	25.3%	10.3%
	trn	m		FAST	M	\$ 8,108				PCP	M	\$ 7,040			
										CHROW	L	\$ 10,286			
<b>TECHNOLOGY:</b> Computer & Peripherals; Computer Software & Services.; E-Commerce; Industrial Technology; Office Equip.; Internet Services; Semiconductor & Equipment	SWI	S	\$ 7,538										\$ 28,722	20.2%	19.4%
										QCOM	L	\$ 12,080			
	CTSH	L	\$ 9,105												
<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	\$ 6,728										\$ 6,728	4.7%	3.0%
<b>CASH IN PORTFOLIO:</b>													\$ 10,253	7.2%	
<b>TOTALS FOR COLUMN</b>			\$ 54,311			\$ 8,108			\$ 6,846			\$ 62,991	\$ 142,509	100.0%	100.0%
<b>% in relationship to Total Portfolio</b>			38.1%			5.7%			4.8%			44.2%	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 & VALUE LINE INDUSTRY RANK



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SUMMARY AND INDEX • THE VALUE LINE INVESTMENT SURVEY

April 24, 2015

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

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

## NOTES ON VALUE LINE TIMELINESS RANK :

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, Healthcare and Computer Software