



We saw another up day in the biotech world, iShares Biotech (IBB, \$320.11). Again, names we like such as Amgen (AMGN, \$173.87), Valeant Pharmaceuticals (VRX, \$15.50), and Editas Medicine (EDIT, \$17.54) rose with the trend.

**Curry Payday.** Other names like Lululemon (LULU, \$54.25) and Under Armor (UA, \$19.24) continue to be value plays amidst a difficult manufacturing sector. We believe Under Armor has not become an un-cool brand and there are still plenty of individuals running around proud to don UA gear. Of note, Stephen Curry to due for a large contract upgrade and a large signing placing Steph in the elitest of basketball players would similarly elevate Under Armor and leave CEO Kevin Plank's tone-deaf comments in the forgotten pile.

**Do Forget Retail.** No suitors for Nordies or Macy's and PE investors licking their own retail wounds. No safe haven for Kohl's (KSS, \$36.30) in the midst of their stock buyback still trading at lower levels than a few weeks ago. Why not take advantage of a company willing to plow back money into their own stock due to pressure, both from investors and industry.

**Time for Toys?** With Hasbro (HAS, \$110.47) riding the heels of their big victory with Disney (DIS, \$104.22) and now valued at 2x the market cap of Mattel (MAT, \$20.30), why not visit a pairwise trade as Mattel still has some life left in their product line and Hasbro is not that far ahead. Let's not forget just 6 months ago Habros was belong 80 and Mattel was above 30.

Me too. AMD (AMD, \$14.38) has become the ideal me too play of the chip sector as the cheaper secondary player to Nvidia (NVDA, \$158.37). So AMD claims the Radeon chip is comparable in performance and

favorable in price to Nvidia's high performance chips, so time to bitcoin mine away!