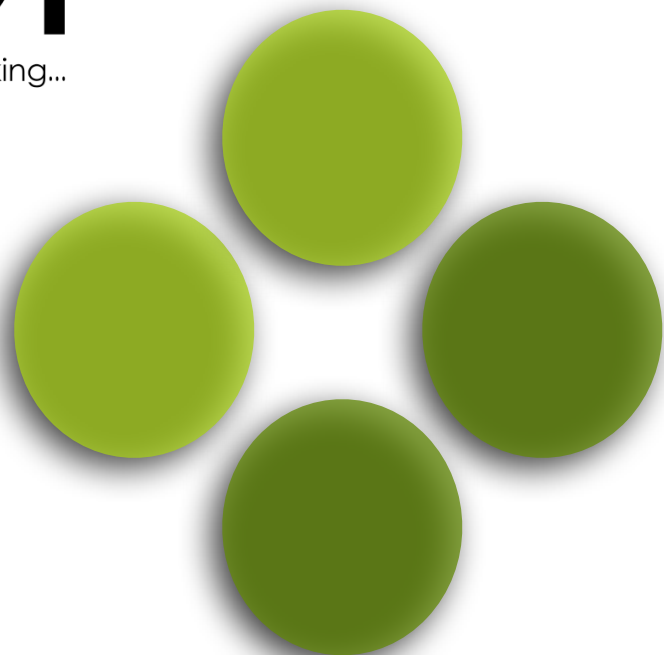


Cl^over

Forward Thinking...



List of Recommended Securities



List of Recommended Securities

Ticker: [AAPL](#)

Name: Apple Inc.

What it is: Apple, Inc. designs, manufactures and markets personal computers and related personal computing, and mobile communication devices. It is engaged in designing of Mac laptops, along with OS X, iLife, iWork and professional software.

Why we like it: Apple is growing faster than any other mega-cap company in the entire world. It has a built-in and locked-in customer base of more than 100 million customers. It has a revolutionary easiest-to-use ecosystem that is adding to its already unheard-of critical mass. It has many new revenue categories such as television-content delivery, wearable computing, and talking interactivity. It is expected to report more profits in one quarter this year than any company has ever done in history. Most of all, the stock is extremely cheap. It is cheaper than most corporations on the S&P 500.

For a deeper understanding of why we like this sector please read: [Buy Tech, Sell Financials – MarketWatch.com](#)

Ticker: [AGRO](#)

Name: Adecoagro S.A.

What it is: Adecoagro SA operates as a holding company, which engages in the production of agro products and renewable energy. It operates in the following businesses: farming, sugar, ethanol, energy and land transformation.

Why we like it: AGRO is a play on the future increase in demand for food commodities originating from the BRICS countries. It is a leader in farming in South America. This stock is presently trading at book value and presents a great opportunity long term.

For a deeper understanding of why we like this sector please read: [From the farm to your wallet – MarketWatch.com](#)

Ticker: [ARNA](#)

Name: Arena Pharmaceuticals Inc.

What it is: Arena Pharmaceuticals, Inc. is a biopharmaceutical company that focuses on discovery, development and commercialization of drugs in the therapeutic areas of cardiovascular, central nervous system, inflammatory and metabolic diseases.

Why we like it: Arena is in the process of launching BELVIQ which is an anti-obesity drug. The stock is volatile and risky but presents a huge potential.

Ticker: [BUD](#)

Name: Anheuser-Busch InBev N.V.

What it is: Anheuser-Busch InBev SA is engaged in the manufacturing, marketing and distribution of alcoholic and non-alcoholic beverages. It operates through the following geographical segments: North America, Latin America North, Latin America South, Western Europe, Central and Eastern Europe, Asia Pacific, and Global Export and Holding Companies. Its brands include Budweiser, Stella Artois, Beck's, Leffe, Hoegaarden, Bud Light, Skol, Brahma, Antarctica, Quilmes Cristal, Michelob Lager, Harbin, Klinskoye, Sibirskaya Korona, Chernigivske, Hasseroder, and Jupiler.

Why we like it: Alcohol consumption is increasing globally and presents growth opportunities in both bull and bear markets.

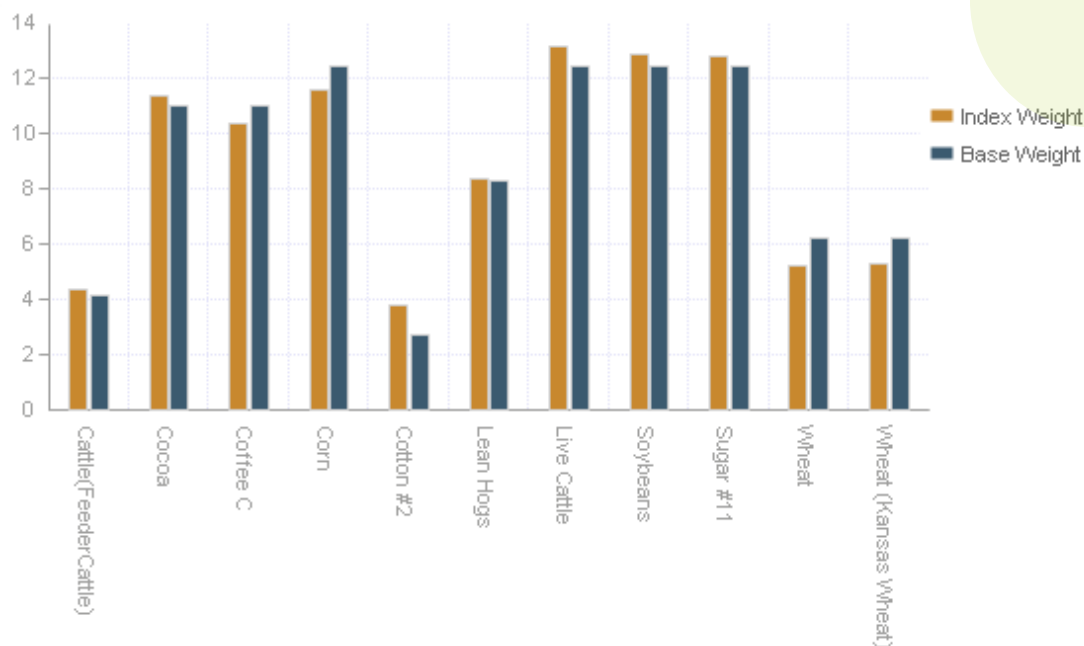
For a deeper understanding of why we like this sector please read: [Ten reasons to get loaded on alcohol stocks – MarketWatch.com](#)



Ticker: [DBA](#)

Name: PowerShares DB Agriculture Fund

What it is: An ETF designed for investors who want a cost-effective and convenient way to invest in food commodity futures.



Why we like it: Like AGRO, DBA is a play on the future increase in demand for food commodities originating from the BRICS countries. Instead of buying into a corporation, DBA provide exposure to the commodities themselves.

For a deeper understanding of why we like this sector please read: [From the farm to your wallet – MarketWatch.com](#)

Ticker: [ABV](#)

Name: Companhia de Bebidas das Americas

What it is: AMBEV engages in the production, distribution and sale of beer, soft drinks and non-carbonated beverages. It has a portfolio of market leading brands including beers Antarctica, Brahma, Bohemia, Quilmes and Skol. The company operates through the following segments: Latin America North, Latin America South and Canada.

Why we like it: Same reasons as BUD but in the more rapidly growing markets of Latin America. With the Olympics and the World Cup coming to Brazil, beer has a bright future for many years.

For a deeper understanding of why we like this sector please read: [Ten reasons to get loaded on alcohol stocks – MarketWatch.com](#)

Ticker: [DXJ](#)

Name: WisdomTree Japan Hedged Equity Fund.

What it is: The ETF is designed to provide exposure to equity securities in Japan, while at the same time hedging exposure to fluctuations between the value of the U.S. dollar and the Japanese yen. The ETF seek to track the performance of equity securities in Japan that is attributable solely to stock prices without the effect of currency fluctuations.

Why we like it: We expect the Yen to continue its collapse over the next few years, making Japanese exporting company extremely competitive worldwide.

Please read: [Dead Yen walking – MarketWatch.com](#) and [Looking for a home run buy gold and sell Yen – MarketWatch.com](#)



Ticker: [FB](#)

Name: Facebook

What it is: Facebook, Inc. is a social networking service and website. It aims to make the world more open and connected. People use Facebook to stay connected with their friends and family, to discover what is going on in the world around them, and express what matters to them. Developers can use the Facebook platform to build applications (apps) that integrate with Facebook to reach its global network of users and to build products that are more personalized, social, and engaging. The company offers advertisers a unique combination of reach, relevance, social context, and engagement to enhance the value of their ads. Its services include timeline, news feed, messages, lists, ticker and mobile apps.

Why we like it: Facebook has no debt and it has \$8 in cash for each stock in circulation. They receive more hits per day than Google and are in the process of monetizing mobile access. For long-term investors we would not be surprised to see FB exceed \$100 in the next years ahead.

For a deeper understanding of why we like this sector please read: [Buy Tech, Sell Financials – MarketWatch.com](#)

Ticker: [FLOT](#)

Name: iShares Floating Rate Note Fund

What it is: An ETF that mirrors the Barclays Capital US Floating Rate Note < 5 Years Index. It is a fixed income instrument that moves in the same direction as interest rates.

Why we like it: US Interest rates are close to bottom and the probability and magnitude of a future drop is much less than the probability and magnitude of an increase. As a result, the fixed income portion of your portfolio should be positively affected by an increase in interest rates.

For a deeper understanding of why we like this sector please read: [Is the bond bubble about to pop? – MarketWatch.com](#)

Ticker: [GKP](#)

Name: Gulf Keystone Petroleum Ltd

What it is: Gulf Keystone Petroleum Limited is an independent oil and gas exploration and production company with operations in the Kurdistan Region of Iraq.

Why we like it: GKP was rumored to be acquired by Exxon Mobil for £5 in 2011, before the deal took place, one of the founders of the company (Excalibur) sued GKP killing the acquisition. We expect a settlement this year and see GKP winning the legal battle. Therefore, we expect GKP to be acquired in the coming months.

For a deeper understanding of this stock please read: [Gulf Keystone Petroleum - Proactiveinvestors.co.uk](#)

Ticker: [GLD](#)

Name: SPDR Gold Trust

What it is: The largest physically backed gold exchange traded fund (ETF) in the world.

Why we like it: An excellent hedge against Central bankers looking at depreciating their currency, buy Gold like a Currency, not like an asset.

For a deeper understanding of why we like this sector please read: [The Frankenstein economy – MarketWatch.com](#)



Ticker: [IBB](#)

Name: iShares Nasdaq Biotechnology Index Fund

What it is: The Fund seeks investment results that correspond generally to the price and yield performance of the Nasdaq Biotechnology Index.

Why we like it: Biotechnology is in its infancy and given that science has decoded the DNA sequence there is a tremendous advancement in research producing new “life style” drugs. This represents a great opportunity for growth in the portfolio.

For a deeper understanding of why we like this sector please read: [Investing in Biotech Stocks? The Journey to Profits Requires a Good GPS – Nasdaq.com](#)

Ticker: [MOO](#)

Name: Market Vectors-Agribusiness

What it is: The Fund seeks to replicate the price and yield performance of the DAXglobal Agribusiness Index. The Fund will normally invest at least 80% of its total assets in equity securities of U.S. and foreign companies primarily engaged in the business of agriculture.

Why we like it: Another play on the Agriculture industry where through a diversified investment you participate in the growth of more than fifty large Agro corporations.

For a deeper understanding of why we like this sector please read: [From the farm to your wallet – MarketWatch.com](#)

Ticker: [PTH](#)

Name: PowerShares Dynamic Healthcare Sector Portfolio

What it is: This ETF will normally invest at least 90% of its total assets in common stocks that comprise the Index. The Intellidex Index thoroughly evaluates companies based on a variety of investment merit criteria including: price momentum, earnings momentum, quality, management action, and value. The underlying Intellidex Index is comprised of common stocks of 60 U.S. health care companies. These are companies that are principally engaged in the business of providing: health care-related products and services, biotechnology, pharmaceuticals, medical technology, medical supplies, and medical facilities.

Why we like it: The aging population in developed markets and emerging markets is creating tremendous growth in the healthcare sector. Healthcare will continue to present opportunities to grow your capital in the years to come.

For a deeper understanding of why we like this sector please read: [Population and what it means for your portfolio – MarketWatch.com](#)

Ticker: [RCOP](#)

Name: Remy Cointreau S.A.

What it is: Producer of cognac, liqueurs, brandy, champagne, rum, gin, and armagnac. RCOP is one of the largest distributors of high-end liquors in China.

Why we like it: Tremendous growth in its high end products, especially with their Cognac distributed in China. This is a play on China without having to take the risk of poor accounting standards typically seen in Chinese companies.



Ticker: [RDY](#)

Name: Dr. Reddy's Laboratories Ltd

What it is: Dr. Reddy's Laboratories Ltd. is an integrated global pharmaceutical company that manufactures and markets drugs. It operates through three business segments which include: Pharmaceutical Services & Active Ingredients, Global Generics and Proprietary Products. The Pharmaceutical Services & Active Ingredients segment includes active pharmaceutical ingredients and intermediaries. Active pharmaceutical ingredients and intermediaries become finished pharmaceutical products when the dosages are fixed in a form ready for human consumption such as a tablet, capsule or liquid using additional inactive ingredients. The Global Generics segment consists of finished pharmaceutical products ready for consumption by the patient, marketed under a brand name or as generic finished dosages with therapeutic equivalence to branded formulations. The Proprietary Products segment involves new chemical entities for subsequent commercialization and out-licensing.

Why we like it: It is a leader in Generic drugs in the emerging market that should profit from the aging population and the growth of the middle class. It is the no.1 pharmaceutical company in India in turnover and profitability.

Ticker: [RSP](#)

Name: Guggenheim S&P 500 Equal Weighted ETF

What it is: An ETF that seeks to replicate as closely as possible the performance of the S&P 500 Equal Weight Index, where all stocks have the same weighting. [Over the last ten years RSP provided twice the return of the S&P 500 ETF SPY.](#)

Why we like it: One ETF with complete diversification of the S&P 500 without the overweight in sectors such as Financials. All stocks have the same weight, therefore the risk is reduced and the long-term performance increased.

Ticker: [SAM](#)

Name: Boston Beer Co.

What it is: Really good beer... Seriously, Boston Beer Co., Inc. is engaged in the business of producing and selling alcoholic beverages. It produces malt beverages and hard cider products at company-owned breweries and under contract arrangements at other brewery locations. Its products are marketed through the brand names, including Samuel Adams, Sam Adams Light, Twisted Tea and HardCore.

Why we like it: Just like BUD, the market is growing and this stock can outperform during bull markets. However, SAM also presents great future growth potential as it remains a US play at present time and export should grow in the years to come.

For a deeper understanding of why we like this sector please read: [Ten reasons to get loaded on alcohol stocks – MarketWatch.com](#)

Ticker: [SCI](#)

Name: Service Corporation International

What it is: Service Corp. International provides death care products and services. It has a network of funeral homes and cemeteries unequalled in geographic scale and reach. The company also sells cemetery property and funeral & cemetery merchandise. It operates its business through two segments: Funeral and Cemetery. The Funeral segment and Cemetery segment consist of funeral service locations, cemeteries, funeral service/cemetery combination locations, crematoria, and related businesses.

Why we like it: Aging population = increasing level of mortality = an increase in profits for funeral industry. This is a boring business but presents a 15-20% growth in the coming years.



Ticker: [STKL](#)

Name: SunOpta Inc.

What it is: SunOpta, Inc. is focused on organic specialty foods and natural health products. The company specializes in sourcing, processing and packaging of natural and organic food products. They have a focus on strategically vertically integrated business models.

Why we like it: SunOpta is one of the largest organic food distributors in the USA. The stock is relatively cheap vis a vis its peers and a future acquisition is expected.

For a deeper understanding of this stock please read: [SunOpta: 2012 Recap and What's The Next Catalyst-seekingalpha.com](#)

Ticker: [TIP](#)

Name: iShares Barclays TIPS Bond Fund

What it is: This ETF seeks to replicate the Barclays Capital U.S. Treasury Inflation Notes Index. In order to achieve its objective, the fund will use a passive indexing approach. TIP's interest rates are dictated by the inflation rate in the US.

Why we like it: We believe that inflation has only one way to go...UP. Therefore, long sovereign bonds should be avoided and fixed income should consist of floating rates Instruments and Tips.

For a deeper understanding of why we like this sector please read: [Is the bond bubble about to pop? – MarketWatch.com](#)

Ticker: [VOW3](#)

Name: Volkswagen AG

What it is: The largest car manufacturer in the world.

Why we like it: Fastest growing car company with important distribution in China and other emerging markets. A weaker Euro in the future will make Volkswagen products even more attractive.

For a deeper understanding of this stock please read: [Contrarian Investing and the U.S. auto rebound – Seekingalpha.com](#)

Ticker: [XLE](#)

Name: Select Sector Energy Select Sector SPDR Fund

What it is: This ETF seeks to provide investors with a low-cost "passive" approach for investing in a portfolio of equity securities of firms as represented by the Energy Select Sector Index. This investment provides diversification in the oil industry through a single investment.

Why we like it: Oil is a limited resource that continues to increase in value. As the population grows and we reach Peak Oil, the industry should continue to prosper and provide better return than the overall market.

Ticker: [XLK](#)

Name: Select Sector Technology Select Sector SPDR Fund

What it is: This ETF seeks to provide investors with a low-cost "passive" approach for investing in a portfolio of equity securities as represented by the Technology Select Sector Index. This investment provides diversification in the technology industry through a single investment.

Why we like it: Tech continues to be the engine of growth for the US economy. This is where real wealth was created over the last several years and we see no reason for the situation to change going forward.

For a deeper understanding of why we like this sector please read: [Buy Tech, Sell Financials – MarketWatch.com](#)