

Consumer	Financial Services		
<p><b>Hardline Retail</b></p> <p>Peter J. Keith (212) 906-3544</p> <p>Best Buy Co. (BBY) Big Lots (BIG) Costco Wholesale Corp. (COST) Dollar Tree (DLTR) Family Dollar Stores (FDO) hgregg (HGG) Lumber Liquidators Holdings (LL) PetSmart (PETM) Sotthey's (BID) Tractor Supply Company (TSCO)</p>	<p><b>Consumer &amp; Specialty Finance</b></p> <p>John Hecht (415) 835-3912</p> <p>Advance America, Cash Advance Centers (AEA) America's Car-Mart (CRMT) American Capital (ACAS) Ares Capital Corporation (ARCC) CapitalSource (CSE) Cash America International (CSH) City National Corp. (CYN) Columbia Banking Systems (COLB) Consumer Portfolio Services (CPSS) Dollar Financial Corp. (DLLR) EZCORP (EZPW) First Cash Financial Services (FCFS) GATX Corp. (GMT) Hercules Technology Growth Capital (HTGC) KKR Financial Holdings LLC (KFN) Kohlberg Capital Corp. (KCAP) MVC Capital (MVC) PacWest Bancorp (PACW) PennantPark Investment Corp. (PNNT) SVB Financial Group (SIVB) The Bancorp (TBBK) TICC Capital Corp. (TICC) Triangle Capital Corp. (TCAP) Umpqua Holdings Corporation (UMPQ) United PanAm Financial Corp. (UPFC) Westamerica Bancorporation (WABC) Zions Bancorporation (ZION)</p>	<p><b>Investment Banks &amp; Brokers</b></p> <p>David Trone (212) 906-3525</p> <p>Bank of America Corp. (BAC) Citigroup (C) Duff &amp; Phelps Corp. (DUF) E*TRADE Financial Corp. (ETFC) Evercore Partners (EVR) Gleacher &amp; Company (GLCH) Greenhill &amp; Co. (GHL) Jefferies Group (JEF) JPMorgan Chase &amp; Co. (JPM) KBW (KBW) KKR &amp; Co. (KKR) Lazard (LAZ) Morgan Stanley (MS) Piper Jaffray Companies (PJC) Raymond James Financial (RJF) Stifel Financial Corp. (SF) TD AMERITRADE Holding Corp. (AMTD) The Charles Schwab Corp. (SCHW) The Goldman Sachs Group (GS)</p>	<p><b>Market Structure &amp; Financial Processing</b></p> <p>David M. Scharf (415) 835-8942</p> <p>Advent Software (ADVS) Alliance Data Systems Corp. (ADS) CME Group (CME) DealerTrack Holdings (TRAK) Encore Capital Group (ECPG) Fiserv (FISV) FTI Consulting (FCN) Higher One Holdings (ONE) IntercontinentalExchange (ICE) Knight Capital Group (KCG) MSCI (MSCI) NYSE Euronext (NYX) Penson Worldwide (PNSN) Portfolio Recovery Associates (PRAA) The Nasdaq OMX Group (NDAQ) The Western Union Company (WU) Total System Services (TSS)</p>

Financial Services		
<p><b>Mortgage Finance</b></p> <p>Trevor Cranston, CFA (415) 869-4431</p> <p>Invesco Mortgage Capital (IVR) Two Harbors Investment Corp. (TWO)</p>	<p><b>Mortgage Finance</b></p> <p>Steven C. DeLaney (415) 869-4430</p> <p>American Capital Agency Corp. (AGNC) Annaly Capital Management (NLY) Anworth Mortgage Asset Corp. (ANH) Capstead Mortgage Corp. (CMO) Chimera Investment Corp. (CIM) Colony Financial (CLNY) CreXus Investment Corp. (CXS) Cypress Sharpridge Investments (CYS) Dynex Capital (DX) Hatteras Financial Corp. (HTS) MFA Financial (MFA) PennyMac Mortgage Investment Trust (PMT) Redwood Trust (RWT) Resource Capital Corp. (RSO) Walter Investment Management Corp. (WAC)</p>	<p><b>Specialty Insurance</b></p> <p>Matthew Carletti (415) 835-8900</p> <p>Allied World Assurance Company (AWH) Alterra Capital Holdings (ALTE) AMERISAFE (AMSF) Arch Capital Group (ACGL) Eastern Insurance Holdings (EIHI) Employers Holdings (EIG) Endurance Specialty Holdings (ENH) HCC Insurance Holdings (HCC) PartnerRe (PRE) RLI Corp. (RLI) SeaBright Insurance Holdings (SBX) Validus Holdings (VR)</p>

### Healthcare

#### Biotechnology

Liisa A. Bayko  
(312) 674-4564

Achillion Pharmaceuticals (ACHN)  
Anadys Pharmaceuticals (ANDS)  
Ardea Biosciences (RDEA)  
Human Genome Sciences (HGSI)  
Idenix Pharmaceuticals (IDIX)  
Incyte Corporation (INCY)  
Inhibitex (INHX)  
InterMune (ITMN)  
Optimer Pharmaceuticals (OPTR)  
Pharmasset (VRUS)  
Salix Pharmaceuticals (SLXP)  
Savient Pharmaceuticals (SVNT)  
Trius Therapeutics (TSRX)  
Vertex Pharmaceuticals (VRTX)  
ViroPharma (VPHM)

#### Biotechnology

Jason N. Butler, PhD  
(212) 906-3505

Arena Pharmaceuticals (ARNA)  
Biodel (BIOD)  
Halozyme Therapeutics (HALO)  
MannKind Corp. (MNKD)  
VIVUS (VVUS)

#### Biotechnology

Charles C. Duncan, PhD  
(212) 906-3510

ACADIA Pharmaceuticals (ACAD)  
Alexza Pharmaceuticals (ALXA)  
Allos Therapeutics (ALTH)  
BioCryst Pharmaceuticals (BCRX)  
Cadence Pharmaceuticals (CADX)  
Celera Group (CRA)  
Celgene Corp. (CELG)  
Cephalon (CEPH)  
Corcept Therapeutics (CORT)  
Cytokinetics (CYTK)  
Genomic Health (GHDX)  
Inovio Pharmaceuticals (INO)  
Myriad Genetics (MYGN)  
Oncocyte (ONTY)  
Orexigen Therapeutics (OREX)  
Osiris Therapeutics (OSIR)  
PDL Biopharma (PDL)  
Rockwell Medical Technologies (RMTI)  
Sangamo BioSciences (SGMO)  
ZIOPHARM Oncology (ZIOP)

### Healthcare

#### Healthcare Services & Facilities

Peter L. Martin, CFA  
(415) 835-8904

Chemed Corp. (CHE)  
Chindex International (CHDX)  
Concord Medical Services Holdings (CCM)  
Healthcare Realty Trust (HR)  
LTC Properties (LTC)  
Medical Properties Trust (MPW)  
National Health Investors (NHI)  
Nationwide Health Properties (NHP)  
Omega Healthcare Investors (OHI)  
RehabCare Group (RHB)  
Rural/Metro Corp. (RURL)  
Sabra Healthcare REIT (SBRAV)  
Senior Housing Properties Trust (SNH)  
Skilled Healthcare Group (SKH)  
Sun Healthcare Group (SUNH)  
The Ensign Group (ENSG)  
U.S. Physical Therapy (USPH)

#### Healthcare Services & IT

Constantine Davides, CFA  
(617) 235-8502

Alere (IMA)  
Allscripts Healthcare Solutions (MDRX)  
American CareSource Holdings (ANCI)  
athenahealth (ATHN)  
Catalyst Health Solutions (CHSI)  
CVS Caremark Corp. (CVS)  
Express Scripts (ESRX)  
Healthways (HWAY)  
McKesson Corp. (MCK)  
MedAssets (MDAS)  
Medco Health Solutions (MHS)  
PharMerica Corp (PMC)  
Quality Systems (QSII)  
SXC Health Solutions Corp. (SXC)  
Walgreen Co. (WAG)

#### Medical Devices

Jose J. Haresco III, PhD  
(415) 869-4477

Align Technology (ALGN)  
American Medical Systems Holdings (AMMD)  
Boston Scientific Corp. (BSX)  
Bruker Corp. (BRKR)  
CardioNet (BEAT)  
Cardiovascular Systems (CSII)  
Insulet Corp. (PODD)  
Intuitive Surgical (ISRG)  
NuVasive (NUVA)  
Palomar Medical Technologies (PMTI)  
Stereotaxis (STXS)  
STERIS Corp. (STE)  
Uroplasty (UPI)  
Volcano Corporation (VOLC)

**Real Estate**

**Housing & Housing Supply Chain**

Michael G. Smith  
(415) 835-8965

Beazer Homes USA (BZH)  
Builders FirstSource (BLDR)  
D.R. Horton (DHI)  
Hovnanian Enterprises (HOV)  
KB Home (KBH)  
Lennar Corp. (LEN)  
M.D.C. Holdings (MDC)  
M/I Homes (MHO)  
Meritage Homes Corp. (MTH)  
NVR (NVR)  
PGT (PGTI)  
PulteGroup (PHM)  
Standard Pacific Corp. (SPF)  
The Ryland Group (RYL)  
Toll Brothers (TOL)

**Housing & Real Estate**

James F. Wilson, CFA  
(415) 835-8975

Apartment Investment & Management Co. (AIV)  
BRE Properties (BRE)  
CoStar Group (CSGP)  
Education Realty Trust (EDR)  
Equity LifeStyle Properties (ELS)  
Essex Property Trust (ESS)  
Forestar Group (FOR)  
LoopNet (LOOP)  
Mid-America Apartment Communities (MAA)  
The St. Joe Company (JOE)  
ZipRealty (ZIPR)

**Lodging & Property Services**

William C. Marks  
(415) 835-8944

Alexandria Real Estate Equities (ARE)  
Ashford Hospitality Trust (AHT)  
CB Richard Ellis Group (CBG)  
Chatham Lodging Trust (CLDT)  
Chesapeake Lodging Trust (CHSP)  
DiamondRock Hospitality Co. (DRH)  
Digital Realty Trust (DLR)  
FelCor Lodging Trust (FCH)  
Gaylord Entertainment Co. (GET)  
Great Wolf Resorts (WOLF)  
Grubb & Ellis Company (GBE)  
Hersha Hospitality Trust (HT)  
HFF (HF)  
Host Hotels & Resorts (HST)  
Jones Lang LaSalle (JLL)  
Marriott International (MAR)  
Morgans Hotel Group Co. (MHGC)  
Red Lion Hotels Corp. (RLH)  
Starwood Hotels & Resorts (HOT)  
Strategic Hotel Capital (BEE)  
Supertel Hospitality (SPPR)  
Vail Resorts (MTN)

**Office & Industrial REITs**

Mitchell B. Germain  
(212) 906-3546

AMB Property Corp. (AMB)  
Boston Properties (BXP)  
Brandywine Realty Trust (BDN)  
Commonwealth REIT (CWH)  
DCT Industrial Trust (DCT)  
Digital Realty Trust (DLR)  
Douglas Emmett (DEI)  
EastGroup Properties (EGP)  
Government Properties Income Trust (GOV)  
Kilroy Realty Corp. (KRC)  
Liberty Property Trust (LRY)  
Parkway Properties (PKY)  
SL Green Realty Corp. (SLG)  
Thomas Properties Group (TPGI)  
Washington Real Estate Investment Trust (WRE)

**Technology**

**Clean Technology**

Bryce Dille, CFA  
(415) 835-8916

A123 Systems (AONE)  
ADA-ES (ADES)  
Calgon Carbon Corp. (CCC)  
Comverge (COMV)  
Ener1 (HEV)  
EnerNOC (ENOC)  
Fuel Tech (FTEK)  
Maxwell Technologies (MXWL)  
Power-One, Inc. (PWER)  
PowerSecure International (POWR)  
Satcon Technology Corporation (SATC)  
UQM Technologies (UQM)

**Communications Equipment & IT Hardware**

Douglas Ireland  
(415) 835-3918

Blue Coat Systems (BCSI)  
Brocade Communications (BRCD)  
Cisco Systems (CSCO)  
Compellent Technologies (CML)  
EMC Corp. (EMC)  
Fortinet (FTNT)  
Hewlett-Packard Company (HPQ)  
Ixia (XXIA)  
Meru Networks (MERU)  
Mitel Networks Corp. (MITL)  
NETGEAR (NTGR)  
QLogic Corp. (QLGC)  
Riverbed Technology (RVBD)  
SHORETEL (SHOR)  
Websense (WBSN)  
Xerox Corp. (XRX)

**Semiconductors & Clean Technology**

Alex Gauna  
(415) 835-8998

Advanced Micro Devices (AMD)  
Apple (AAPL)  
Broadcom Corporation (BRCM)  
Cavium Networks (CAVM)  
Cree (CREE)  
Entropic Communications (ENTR)  
First Solar (FSLR)  
Intel Corp. (INTC)  
Marvell Technology Group (MRVL)  
Micron Technology (MU)  
NetLogic Microsystems (NETL)  
NVIDIA Corp. (NVDA)  
Power Integrations (POWI)  
QUALCOMM (QCOM)  
Research In Motion (RIMM)  
SanDisk Corp. (SNDK)  
Silicon Laboratories (SLAB)  
Skyworks Solutions (SWKS)  
Spreadtrum Communications (SPRD)  
SunPower Corp. (SPWR)  
Texas Instruments (TXN)  
Volterra Semiconductor Corp. (VLTR)

**Software**

Patrick D. Walravens  
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Actuate Corp. (BIRT)  
Adobe Systems (ADBE)  
ArcSight (ARST)  
Ariba (ARBA)  
Citrix Systems (CTXS)  
CommVault Systems (CVLT)  
Convio (CNVO)  
DemandTec (DMAN)  
Informatica Corp. (INFA)  
JDA Software Group (JDAS)  
Kenexa Corp. (KNXA)  
NetSuite (N)  
Oracle Corp. (ORCL)  
Rackspace Hosting (RAX)  
RealPage (RP)  
RightNow Technologies (RNOW)  
salesforce.com (CRM)  
SAP (SAP)  
SciQuest (SQI)  
SPS Commerce (SPSC)  
SuccessFactors (SFSF)  
Symantec Corp. (SYMC)  
Ultimate Software Group (ULTI)  
VMware (VMW)