

## 40 Stocks Portfolio Managers are trading



As per 10.08.2020

All prices, returns and market cap are in local currency

1M  
11.07.2020  
10.08.2020

Stock	Trading action	Ticker	Base Currency	Exchange	Business Country	Price 52 weeks			Market Cap (mil)	GICS Sector	Industry	Return YTD	Return
						Last Close	High	Low					
Renewable Energy Group Inc	Add	REGI	US Dollar	Nasdaq	United States	37.61	40.14	10.42	1 478	Energy	Oil & Gas Refining & Marketing	39.55	60.86
Polymetal International PLC	New	POLY	Pound Sterling	London Stock Exchange	Russian Federation	19.32	20.51	9.90	9 497	Materials	Other Precious Metals & Mining	74.06	25.89
Farfetch Ltd Class A	Add	FTCH	US Dollar	New York Stock Exchange, Inc.	United Kingdom	25.13	28.25	5.99	8 541	Consumer Discretionary	Internet Retail	150.14	21.44
InMode Ltd	New	INMD	US Dollar	Nasdaq	Israel	31.12	58.76	13.14	1 021	Health Care	Medical Devices	-21.10	19.79
Apple Inc	Trim	AAPL	US Dollar	Nasdaq	United States	437.50	457.65	199.15	1 870 590	Information Technology	Consumer Electronics	54.61	17.74
Vestas Wind Systems A/S	New	VVWS	Danish Krone	Nasdaq OMX Copenhagen A/S	Denmark	927.00	927.40	473.00	182 549	Industrials	Specialty Industrial Machinery	27.54	14.09
Lululemon Athletica Inc	Add	LULU	US Dollar	Nasdaq	United States	335.37	347.35	128.85	43 668	Consumer Discretionary	Apparel Retail	48.63	9.52
Unilever NV	Add	UNA	Euro	Euronext - Euronext Amsterdam	Netherlands	49.02	57.77	38.42	185 562	Consumer Staples	Household & Personal Products	-1.01	7.75
adidas AG	Add	ADS	Euro	XETRA	Germany	263.30	317.45	162.20	49 499	Consumer Discretionary	Footwear & Accessories	-12.42	7.72
Facebook Inc A	Trim	FB	US Dollar	Nasdaq	United States	256.13	278.89	137.10	729 667	Communication Services	Internet Content & Information	28.14	7.32
Meituan Dianping	Trim	03690	Hong Kong Dollar	Hong Kong Exchanges And Clearing Lt	China	218.40	229.20	62.05	1 278 421	Consumer Discretionary	Internet Retail	118.84	7.11
Weichai Power Co Ltd	Add	000338	Chinese Yuan Renmint	Shenzhen Stock Exchange	China	16.05	17.40	10.65	125 050	Industrials	Specialty Industrial Machinery	2.96	6.65
China Tourism Group Duty Free Corp Ltd Class A	Trim	601888	Chinese Yuan Renmint	Shanghai Stock Exchange	China	214.28	249.00	66.50	418 376	Consumer Discretionary	Travel Services	141.26	5.46
Orpea SA	Add	ORP	Euro	Euronext - Euronext Paris	France	107.15	129.00	69.10	6 919	Health Care	Medical Care Facilities	-7.96	5.15
SSE PLC	Add	SSE	Pound Sterling	London Stock Exchange	United Kingdom	13.16	17.03	10.58	13 734	Utilities	Utilities - Diversified	-2.77	4.19
Nintendo Co Ltd	Trim	7974	Japanese Yen	Tokyo Stock Exchange	Japan	50 040.00	51 910.00	31 880.00	5 960 947	Communication Services	Electronic Gaming & Multimedia	17.06	3.66
Air Products & Chemicals Inc	Add	APD	US Dollar	New York Stock Exchange, Inc.	United States	281.60	299.82	167.43	62 204	Materials	Chemicals	21.15	2.95
REX American Resources Corp	Add	REX	US Dollar	New York Stock Exchange, Inc.	United States	69.36	98.79	33.81	429	Energy	Oil & Gas Refining & Marketing	-14.32	2.56
Advanced Metallurgical Group NV	Add	AMG	Euro	Euronext - Euronext Amsterdam	Netherlands	16.39	25.63	11.79	465	Materials	Other Industrial Metals & Mining	-24.85	1.57
Faurecia SE	New	EO	Euro	Euronext - Euronext Paris	France	36.54	53.02	20.58	5 003	Consumer Discretionary	Auto Parts	-27.07	1.39
Veolia Environnement SA	New	VIE	Euro	Euronext - Euronext Paris	France	20.03	29.09	16.02	11 105	Utilities	Waste Management	-14.70	0.77
SAP SE	Add	SAP	Euro	XETRA	Germany	137.10	143.20	82.13	163 649	Information Technology	Software - Application	13.81	-0.07
Enel SpA	Add	ENEL	Euro	Borsa Italiana S.P.A.	Italy	7.96	8.61	5.15	80 955	Utilities	Utilities - Diversified	15.84	-0.08
Deutsche Telekom AG	Add	DTE	Euro	XETRA	Germany	14.99	16.75	10.41	71 073	Communication Services	Telecom Services	6.19	-0.30
Ferrari NV	Add	RACE	Euro	Borsa Italiana S.P.A.	Italy	159.00	169.05	114.00	39 447	Consumer Discretionary	Auto Manufacturers	6.40	-0.54
Synopsys Inc	New	SNPS	US Dollar	Nasdaq	United States	191.04	204.90	104.90	28 807	Information Technology	Software - Infrastructure	40.55	-1.20
Credit Saison Co Ltd	Out	8253	Japanese Yen	Tokyo Stock Exchange	Japan	1 120.00	1 958.00	976.00	174 979	Financials	Credit Services	-42.62	-1.59
Network International Holdings PLC	Add	NETW	Pound Sterling	London Stock Exchange	United Arab Emirat	4.47	6.56	3.17	2 448	Information Technology	Information Technology Services	-30.58	-2.11
Microsoft Corp	Trim	MSFT	US Dollar	Nasdaq	United States	203.38	217.64	132.25	1 539 109	Information Technology	Software - Infrastructure	32.78	-2.54
Fresenius Medical Care AG & Co. KGaA	Out	FME	Euro	XETRA	Germany	73.56	81.10	53.50	22 072	Health Care	Medical Care Facilities	9.85	-3.00
Micron Technology Inc	Add	MU	US Dollar	Nasdaq	United States	47.76	61.19	31.13	53 061	Information Technology	Semiconductors	-8.61	-3.06
Repay Holdings Corp Ordinary Shares - Class A	Trim	RPAY	US Dollar	Nasdaq	United States	24.80	27.93	10.69	1 451	Information Technology	Software - Infrastructure	69.56	-3.42
Akamai Technologies Inc	New	AKAM	US Dollar	Nasdaq	United States	106.22	116.39	75.18	17 283	Information Technology	Software - Infrastructure	24.88	-5.59
Cie Financiere Richemont SA	Out	CFR	Swiss Franc	SIX Swiss Exchange	Switzerland	59.24	82.28	44.64	33 475	Consumer Discretionary	Luxury Goods	-24.48	-8.30
Sonos Inc	Add	SONO	US Dollar	Nasdaq	United States	13.54	17.83	6.58	1 498	Consumer Discretionary	Consumer Electronics	-11.59	-8.57
Hermes International SA	Add	RMS	Euro	Euronext - Euronext Paris	France	691.20	788.20	516.00	72 300	Consumer Discretionary	Luxury Goods	3.28	-11.25
Netflix Inc	Add	NFLX	US Dollar	Nasdaq	United States	466.93	575.37	252.28	205 923	Communication Services	Entertainment	49.39	-11.91
360 Finance Inc ADR	New	QFIN	US Dollar	Nasdaq	China	13.79	18.06	6.37	2 023	Financials	Credit Services	35.01	-14.46
Huifu Payment Ltd Ordinary Shares	New	01806	Hong Kong Dollar	Hong Kong Exchanges And Clearing Lt	China	3.23	3.95	1.68	4 171	Information Technology	Software - Infrastructure	28.51	-15.57
Barco NV	Trim	BAR	Euro	Euronext - Euronext Brussels	Belgium	17.28	35.36	15.06	1 581	Information Technology	Electronic Components	-46.92	-25.88

Source: WSP research, fund managers, Morningstar data

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