

Business Services		Consumer	Financial Services	
<p><b>Business &amp; Professional Services</b></p> <p>Kevane A. Wong (415) 835-8976</p> <p>FTI Consulting (FCN) Huron Consulting Group (HURN) Navigant Consulting (NCI)</p>	<p><b>Financial Processing &amp; Outsourcing</b></p> <p>David M. Scharf (415) 835-8942</p> <p>Advent Software (ADVS) Alliance Data Systems Corp. (ADS) Clayton Holdings (CLAY) CyberSource Corp. (CYBS) DealerTrack Holdings (TRAK) eTelecare Global Solutions (ETEL) Fiserv (FISV) Fundtech (FNDD) Hercules Technology Growth Capital (HTGC) MoneyGram International (MGI) optionsXpress Holdings (OXPS) Penson Worldwide (PNSN) PeopleSupport (PSPT) Portfolio Recovery Associates (PRAA) RiskMetrics Group (RMG) The Western Union Company (WU) Total System Services (TSS)</p>	<p><b>Lifestyle Retailing &amp; Products</b></p> <p>Kristine M. Koerber (415) 835-8962</p> <p>1-800-Flowers.com (FLWS) Blue Nile (NILE) Cost Plus (CPWM) Drugstore.com (DSCM) Movado Group (MOV) PetMed Express (PETS) Shutterfly (SFLY) Sotheby's Holdings (BID) Steiner Leisure Limited (STNR) Sport Supply Group (RBI) The Parent Company (KIDS) Tiffany &amp; Co. (TIF) Tuesday Morning Corp. (TUES) Williams-Sonoma (WSM)</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) AmeriCredit Corp. (ACF) CapitalSource (CSE) Cash America International (CSH) CompuCredit Corp. (CCRT) Consumer Portfolio Services (CPSS) Dollar Financial Corp. (DLLR) Financial Federal Corp. (FIF) 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) Ocwen Financial Corp. (OCN) Patriot Capital Funding (PCAP) QC Holdings (QCCO) United PanAm Financial Corp. (UPFC)</p>	<p><b>Mortgage &amp; Specialty 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) Hatteras Financial Corp. (HTS) MFA Mortgage Investments (MFA)</p>

Healthcare

Biotechnology

Liisa A. Bayko  
(312) 674-4564

Achillion Pharmaceuticals (ACHN)  
Cerus Corp. (CERS)  
Human Genome Sciences (HGS)  
Incyte Corporation (INCY)  
Pharmasset (VRUS)  
Vertex Pharmaceuticals (VRTX)  
ViroPharma (VPHM)

Biotechnology

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

ACADIA Pharmaceuticals (ACAD)  
Alexza Pharmaceuticals (ALXA)  
Allos Therapeutics (ALTH)  
Cadence Pharmaceuticals (CADX)  
Celera Group (CRA)  
Celgene Corp. (CELG)  
Cephalon (CEPH)  
Cytokinetics (CYTK)  
Genomic Health (GHDX)  
Indevus Pharmaceuticals (IDEV)  
Monogram Biosciences (MGRM)  
Myriad Genetics (MYGN)  
Optimer Pharmaceuticals (OPTR)  
Orexigen Therapeutics (OREX)  
PDL Biopharma (PDLI)  
Pharmaxis (PXSL)  
Sangamo BioSciences (SGMO)  
TorreyPines Therapeutics (TPTX)

Healthcare Services

Constantine Davides  
(617) 235-8502

Allscripts Healthcare Solutions (MDRX)  
athenahealth (ATHN)  
Express Scripts (ESRX)  
Healthways (HWAY)  
McKesson Corp. (MCK)  
Medco Health Solutions (MHS)  
Quality Systems (QSII)

Medical Devices

Mimi Pham  
(212) 906-3520

C.R. Bard (BCR)  
DexCom (DXCM)  
Insulet Corp. (PODD)  
Intuitive Surgical (ISRG)  
Stereotaxis (STXS)  
Thoratec Corp. (THOR)

Medical Devices

Coverage in Transition  
(415) 835-8900

NxStage Medical (NXTM)

Real Estate

Hotels & Resorts  
Real Estate & Property Services

William C. Marks  
(415) 835-8944

Ashford Hospitality Trust (AHT)  
CB Richard Ellis Group (CBG)  
DiamondRock Hospitality Co. (DRH)  
Digital Realty Trust (DLR)  
Gaylord Entertainment Co. (GET)  
Great Wolf Resorts (WOLF)  
Grubb & Ellis Company (GBE)  
Hersha Hospitality Trust (HT)  
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)

Housing & Housing Supply Chain

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

Beazer Homes USA (BZH)  
BFC Financial Corp. (BFF)  
Builders FirstSource (BLDR)  
Building Materials Holding Corp. (BLG)  
California Coastal Communities (CALC)  
Centex Corp. (CTX)  
CoStar Group (CSGP)  
D.R. Horton (DHI)  
Hovnanian Enterprises (HOV)  
KB Home (KBH)  
Lennar Corp. (LEN)  
LoopNet (LOOP)  
M.D.C. Holdings (MDC)  
Meritage Homes Corp. (MTH)  
Orleans Homebuilders (OHB)  
PGT (PGTI)  
Pulte Homes (PHM)  
Simpson Manufacturing Co. (SSD)  
Standard Pacific Corp. (SPF)  
The St. Joe Company (JOE)  
Toll Brothers (TOL)  
ZipRealty (ZIPR)

Technology

Clean Technology

Bryce Dille, CFA  
(415) 835-8916

ADA-ES (ADES)  
Calgon Carbon Corp. (CCC)  
Ceradyne (CRDN)  
Comverge (COMV)  
EnerNOC (ENOC)  
FLIR Systems (FLIR)  
Fuel Tech (FTEK)  
Maxwell Technologies (MXWL)  
PowerSecure International (POWR)

Communications Equipment

Samuel C. Wilson  
(415) 835-8967

Blue Coat Systems (BCSI)  
Brocade Communications (BRCD)  
Ciena Corp. (CIEN)  
Cisco Systems (CSCO)  
Extreme Networks (EXTR)  
F5 Networks (FFIV)  
Foundry Networks (FDRY)  
Ixia (XXIA)  
Juniper Networks (JNPR)  
Motorola (MOT)  
NETGEAR (NTGR)  
Novatel Wireless (NVTL)  
Research In Motion (RIMM)  
Riverbed Technology (RVBD)  
SHORETEL (SHOR)  
Sierra Wireless (SWIR)  
Websense (WBSN)

Consumer Technology  
Products & Services

Coverage in Transition  
(415) 835-8900

Apple Computer (AAPL)  
Global Traffic Network (GNET)

Technology

Internet & Digital Media

Sameet Sinha  
(415) 835-8979

Bankrate (RATE)

Digital River (DRIV)

eHealth (EHTH)

Greenfield Online (SRVY)

GSI Commerce (GSIC)

Marchex (MCHX)

TheStreet.com (TSCM)

ValueClick (VCLK)

Web.com (WWW)

IT Services

Devang Kothari  
(312) 674-4987

Diamond Mgmt. & Tech. Consultants (DTP)

Infosys Technologies (INFY)

Ness Technologies (NSTC)

Perficient (PRFT)

Syntel (SYNT)

On-Demand & Application Software

Patrick D. Walravens  
(415) 835-8943

Actuate Corp. (ACTU)

Ariba (ARBA)

CDC Corp. (CHINA)

Chordiant Software (CHRD)

DemandTec (DMAN)

i2 Technologies (ITWO)

Informatica Corp. (INFA)

Kenexa Corp. (KNXA)

NetSuite (N)

Omniture (OMTR)

Oracle Corp. (ORCL)

RightNow Technologies (RNOW)

salesforce.com (CRM)

SAP (SAP)

STARLIMS Technologies (LIMS)

SuccessFactors (SFSF)

SumTotal Systems (SUMT)

Ultimate Software Group (ULTI)

Semiconductors

Krishna Shankar  
(415) 835-8971

Advanced Analogic Technologies (AATI)

Advanced Micro Devices (AMD)

Broadcom (BRCM)

Cavium Networks (CAVM)

Entropic Communications (ENTR)

Intel Corp. (INTC)

Intersil Corp. (ISIL)

Linear Technology Corp. (LLTC)

Maxim Integrated Products (MXIM)

MEMC Electronic Materials (WFR)

Micrel (MCRL)

Micron Technology (MU)

Monolithic Power Systems (MPWR)

National Semiconductor Corp. (NSM)

NVIDIA Corp. (NVDA)

Pericom Semiconductor Corp. (PSEM)

SanDisk (SNDK)

SMART Modular Technologies (SMOD)

Texas Instruments (TXN)