

Buena Vista Investment Management, LLC

Creative Investment Solutions

Custom Investment Service *Core Equity Universe*

The Buena Vista Core Equity Universe is comprised of companies researched and selected by our investment professionals. The selection of these companies is based upon defined criteria, which allows us to then categorize these investments into three easy to understand classifications.

QUALITY GROWTH – Large capitalization companies which we consider to be leading companies in their respective industries. We prefer that these companies have a five year history of positive earnings and dividend payouts. We consider these companies our most “conservative” investment alternatives.

AIG – Financial
Altria – Consumer Staple
Bank of America – Financial
Comcast – Entertainment
DuPont – Chemical/Food
Ensco – Oil & Gas
General Electric – Conglomerate

Johnson & Johnson – Health Care
J.P. Morgan – Finance
Microsoft – Technology
Pfizer – Health Care
Schlumberger – Oil & Gas
XLK – ETF Technology
XLV – ETF Health

STORY STOCKS – Companies which we consider to have “above average” return potential due to unique industry or company specific circumstances. This group includes “turnaround” or “cyclical” or “innovation” investments, which carry a higher degree of risk. These companies normally will require an extended holding period to fully realize their return potential.

Capstone Turbine – Alternative Energy
Clean Energy Fuels – Energy
Devon Energy – Oil & Gas
Express Scripts – Health Care
Huntington Bancshares – Regional Bank
Isis Pharmaceuticals – Biotech

Natural Gas Turbines
Natural Gas Growth
Strategic Oil Deposits
Aging Population
Financial Recovery
Genetic Research

INCOME GENERATORS – Companies which maintain an above average dividend yield. These investments are used in portfolios where there is a need to generate income and or require a higher degree of diversification. We consider these investments to be suitable for investors requiring a higher level of current income and who are willing to accept market volatility.

AT&T – Telecommunications
Enerplus Resources – Oil & Gas
FSIC-BDC
New York REIT – REIT
Permian Basin Royalty Trust – Oil

Plains All American Pipeline – Oil & Gas
Ship Finance International – Transportation
Verizon – Telecommunications
Westar Energy – Utility
W. P. Carey – Commercial Real Estate

Disclosure - Buena Vista Investment Management may change companies on this list without prior notice. Buena Vista cannot take responsibility for non-clients that use this or other investment information created by Buena Vista to make their own investment decisions.

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