

Consumer		Financial Services	
<p>Lifestyle Retailing & Products</p> <p>Kristine M. Koerber (415) 835-8962</p> <p>Big 5 Sporting Goods Corp. (BGFV) Blue Nile (NILE) Cabela's (CAB) Callaway Golf Company (ELY) Dick's Sporting Goods (DKS) Hibbett Sports (HIBB) lululemon athletica (LULU) PetMed Express (PETS) Shutterfly (SFLY) Sotheby's Holdings (BID) Sport Supply Group (RBI) Tiffany & Co. (TIF) Williams-Sonoma (WSM)</p>	<p>Hardline Retail</p> <p>Peter J. Keith (212) 906-3544</p> <p>Best Buy Co. (BBY) Big Lots (BIG) Dollar Tree (DLTR) Family Dollar Stores (FDO) hgregg (HGG) PetSmart (PETM) Tractor Supply Company (TSCO)</p>	<p>Brokers & Asset Managers</p> <p>David Trone (212) 906-3525</p> <p><i>Coverage to Be Determined</i></p>	<p>Financial Processing & Outsourcing</p> <p>David M. Scharf (415) 835-8942</p> <p>Advent Software (ADVS) Alliance Data Systems Corp. (ADS) CME Group (CME) CyberSource Corp. (CYBS) DealerTrack Holdings (TRAK) 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>Mortgage Finance</p> <p>Trevor Cranston, CFA (415) 869-4431</p> <p>Invesco Mortgage Capital (IVR) Two Harbors Investment Corp. (TWO)</p>	<p>Mortgage Finance</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) Walter Investment Management Corp. (WAC)</p>	<p>Specialty Finance & Commercial Banks</p> <p>John Hecht (415) 835-3912</p> <p>Advance America, Cash Advance Centers (AEA) America's Car-Mart (CRMT) AmeriCredit Corp. (ACF) Ares Capital Corporation (ARCC) CapitalSource (CSE) Cash America International (CSH) Cathay General Bancorp (CATY) City National Corp. (CYN) Columbia Banking Systems (COLB) Consumer Portfolio Services (CPSS) CVB Financial Corp. (CVBF) Dollar Financial Corp. (DLLR) East West Bancorp (EWBC) 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) Pacific Capital Bancorp (PCBC) PacWest Bancorp (PACW) SVB Financial Group (SIVB) The Bancorp (TBBK) Umpqua Holdings Corporation (UMPQ) United PanAm Financial Corp. (UPFC) Westamerica Bancorporation (WABC) Wilshire Bancorp (WIBC) Zions Bancorporation (ZION)</p>	<p>Specialty Insurance</p> <p>Matthew Carletti (415) 835-8900</p> <p>AMERISAFE (AMSF) Employers Holdings (EIG) Endurance Specialty Holdings (ENH) HCC Insurance Holdings (HCC) 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 (HGSJ)
Idenix Pharmaceuticals (IDIX)
Incyte Corporation (INCY)
InterMune (ITMN)
Optimer Pharmaceuticals (OPTR)
Pharmasset (VRUS)
Salix Pharmaceuticals (SLXP)
Savient Pharmaceuticals (SVNT)
Vertex Pharmaceuticals (VRTX)
ViroPharma (VPHM)

Biotechnology

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

Arena Pharmaceuticals (ARNA)
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)
Myriad Genetics (MYGN)
Orexigen Therapeutics (OREX)
Osiris Therapeutics (OSIR)
PDL Biopharma (PDLI)
Rockwell Medical Technologies (RMTI)
Sangamo BioSciences (SGMO)
ZIOPHARM Oncology (ZIOP)

Healthcare

Healthcare Services & IT

Constantine Davides, CFA
(617) 235-8502

Allscripts Healthcare Solutions (MDRX)
American CareSource Holdings (ANCI)
athenahealth (ATHN)
CVS Caremark Corp. (CVS)
Express Scripts (ESRX)
Healthways (HWAY)
Inverness Medical Innovations (IMA)
McKesson Corp. (MCK)
MedAssets (MDAS)
Medco Health Solutions (MHS)
PharMerica Corp (PMC)
Quality Systems (QSII)
SXC Health Solutions Corp. (SXCJ)

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)
Odyssey Healthcare (ODSY)
Omega Healthcare Investors (OHI)
Senior Housing Properties Trust (SNH)
Skilled Healthcare Group (SKH)
Sun Healthcare Group (SUNH)
The Ensign Group (ENSG)
U.S. Physical Therapy (USPH)

Medical Devices

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

Coverage to Be Determined

Real Estate

Housing & Real Estate

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

Apartment Investment & Management Co. (AIV)
Beazer Homes USA (BZH)
BRE Properties (BRE)
Builders FirstSource (BLDR)
CoStar Group (CSGP)
D.R. Horton (DHI)
Essex Property Trust (ESS)
Hovnanian Enterprises (HOV)
KB Home (KBH)
Lennar Corp. (LEN)
LoopNet (LOOP)
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)
The St. Joe Company (JOE)
Toll Brothers (TOL)
ZipRealty (ZIPR)

Lodging & Real Estate

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)
DCT Industrial Trust (DCT)
Digital Realty Trust (DLR)
Douglas Emmett (DEI)
EastGroup Properties (EGP)
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

Application & Enterprise Software

Patrick D. Walravens
(415) 835-8943

Actuate Corp. (ACTU)
Adobe Systems (ADBE)
Ariba (ARBA)
CDC Corp. (CHINA)
CDC Software Corp. (CDCS)
Convio (CNVO)
DemandTec (DMAN)
Informatica Corp. (INFA)
JDA Software Group (JDAS)
Kenexa Corp. (KNXA)
NetSuite (N)
Oracle Corp. (ORCL)
Rackspace Hosting (RAX)
RightNow Technologies (RNOW)
salesforce.com (CRM)
SAP (SAP)
SPS Commerce (SPSC)
SuccessFactors (SFSF)
Ultimate Software Group (ULTI)

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)
PowerSecure International (POWR)
UQM Technologies (UQM)

Communications Equipment & Enterprise Infrastructure

Douglas Ireland
(415) 835-3918

Apple (AAPL)
Blue Coat Systems (BCSI)
Brocade Communications (BRCD)
Ciena Corp. (CIEN)
Cisco Systems (CSCO)
Compellent Technologies (CML)
EMC Corp. (EMC)
Emulex Corp. (ELX)
Extreme Networks (EXTR)
Fortinet (FTNT)
Hewlett-Packard Company (HPQ)
Ixia (XXIA)
Juniper Networks (JNPR)
Lexmark International (LXK)
Meru Networks (MERU)
Mitel Networks Corp. (MITL)
Motorola (MOT)
NetApp (NTAP)
NETGEAR (NTGR)
QLogic Corp. (QLGC)
Research In Motion (RIMM)
Riverbed Technology (RVBD)
SHORETEL (SHOR)
Websense (WBSN)
Xerox Corp. (XRX)

Technology

Infrastructure Software & Services

Peter J. Bussi
(415) 835-3975
ArcSight (ARST)
Citrix Systems (CTXS)
CommVault Systems (CVLT)
Double-Take Software (DBTK)
Symantec Corp. (SYMC)
VMware (VMW)

Internet

Sameet Sinha
(415) 835-8979
Akamai Technologies (AKAM)
Amazon.com (AMZN)
Digital River (DRIV)
eBay (EBAY)
eHealth (EHTH)
Google (GOOG)
GSI Commerce (GSIC)
Limelight Networks (LLNW)
Marchex (MCHX)
TechTarget (TTGT)
The Knot (KNOT)
TheStreet.com (TSCM)
ValueClick (VCLK)
Web.com (WWW)
Yahoo! (YHOO)

Semiconductors & Clean Technology

Alex Gauna
(415) 835-8998
Advanced Micro Devices (AMD)
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)
SanDisk Corp. (SNDK)
Silicon Laboratories (SLAB)
Skyworks Solutions (SWKS)
SunPower Corp. (SPWRA)
Texas Instruments (TXN)
Volterra Semiconductor Corp. (VLTR)