



Manish Babla <gurufundpicks@gmail.com>

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## Buy RJET (Open Position)

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GuruFundPicks.com <support@gurufundpicks.com>  
Reply-To: "GuruFundPicks.com" <support@gurufundpicks.com>  
To: Manish <gurufundpicks@gmail.com>

Thu, May 1, 2014 at 9:31 AM

Overall, 13%-17% avg. position up, and average duration of 8.7 days.

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## Buy RJET (Open Position)

May 1, 2014

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Dear GuruFundPicks' Alpha News Edge Trade Alert Service Customers,

Your latest Trade Alert.

Stock: RJET

Action: Buy (Open Position)

Position Size: Full

Current Price: \$8.60

Investment/ Trading Horizon: Intermediate to Long-term

Investment or Trading Thesis: Operator of American Eagle, Delta Connection, United Express, and US Airways Express, RJET operates 1,300 flights daily in N.America. It reported a stellar quarter report yesterday after the market-close, reporting 26 cents vs. 15 cents (inline Rev.) and raised FY guidance to 1.20-1.40 vs. 1.11 (inline Rev.). The results actually mask even better operations improvement as weather related cancellations ate into \$7.0 pre-tax or ~\$0.11 in EPS - which would mean EPS could have been as high as 37 cents vs. 22 cents YoY which is a huge operational improvement. Meanwhile the stock is trading at its lows, down to ~\$8 from \$14 highs about 8-10 mos. ago. It could earn up to \$1.50+ in FY 2015, which means it is trading at a rock-bottom (low-risk) fwd. PE of only 5-6 and its EBITDA mult. is only < fwd. 4 based on 2015 est. Also, co. is transitioning to larger aircraft, that should help improve margins, and is working on strengthening its contract flying biz, all net positives. Also, its RPMs

are rising, even accelerating slightly. It is going on all frontiers, all that we can hope for in picking a good stock, let's see what the market is ready to reward it.

The company is scheduled to hold a conference call at 11 AM EDT today, so if we take a position before that, watch out for volatility around the time of that call.

Best,

## **Manish Babla**

**Co-Founder & CEO, GuruFundPicks.com**

**MBA, MS, B.Engg.**

**[bablam@GuruFundPicks.com](mailto:bablam@GuruFundPicks.com)**

[www.GuruFundPicks.com](http://www.GuruFundPicks.com)



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