



Manish Babla <gurufundpicks@gmail.com>

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## Sell FEYE (Close Position) - 3rd Time

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

Wed, Jun 11, 2014 at 9:37 AM

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

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## Sell FEYE (Close Position) - 3rd Time

June 11, 2014

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Dear Alpha News Edge Trade Alert Customers,

Your latest Alpha News Edge Trade Alert.

Stock: FEYE

Action: Sell (Close Position)

Position Size: Full

Current Price: \$34.15

Investment/ Trading Horizon: Short- to Intermediate-Term

Thesis: Positioned opened this week on Monday 6/2 at \$31.70, after twice earlier trading this profitably, first a buy at \$27 on 5/15 and closed at \$31.88, and then a buy at \$30.78 on 5/21 and closed May 28th at \$35.18. The third time in this case was also a charm, as we exit this position at a decent profit again. While we still like the stock, and may get back in, we are comfortable getting out here as based on the action, it appears that FEYE is not yet ready to breakout of the recent consolidation range. We may get into this one again, at lower prices, or at higher prices on breakout.

Our earlier overall buy thesis was:

Company holds a dominant position in real-time security protection for enterprises and governments worldwide. It has been getting killed in this correction, down from \$97 high in early March to current prices in the mid-\$20's, even though Qtr. Reports have

been more or less in-line. The concern has been the high valuation on the company, selling at \$14.4 bill. market-cap at its peak when its TTM revenues and earnings are in the \$200 mill. range and losses of about \$200 mill. as well. Going forward, even for FY 2016, forecast is \$834 mill. in revenue and about \$120 mill. in losses. However, growth is expected to remain robust at 30% even in 2016, result in our estimate for FY 2018 profits in the \$200 mill. range. This is no value buy, but rather a buy into a fallen growth leader in an exciting space that has been beaten down and will mount at least a sharp technical rebound in the short-term.

Best,

support@GuruFundPicks.com

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