

Splunk (SPLK 68.67) Provides a software platform that collects and indexes data and enables the user to research, correlate, analyze, monitor and report the data in real time and all thru a cloud platform. Has approximately 3700 customers, sales growth anticipated to increase 40% to 50% in 2014. My top choice for 2014.

Yahoo (YHOO 40.44) Owns a 24% stake in Chinese internet site, Alibaba, China's version of Amazon. Alibaba plans a 2014 IPO and Yahoo stands to collect on a windfall profit from this stake. The Alibaba IPO is expected to be huge. Buying shares in Yahoo is a backdoor play into getting Alibaba shares on the IPO.

Netflix (NFLX 368.17) Forget about the traditional business of getting a DVD movie in the mail, the company is transitioning into TV on the internet and movie streaming both US and international. Who knows what TV will be in 2 or 3 years, but Netflix is likely to be at the forefront of the innovation and change. Price too high? Google once traded at 368.

Baidu (BIDU 177.88) This is a Chinese language internet search provider or China's version of Google. Baidu dominates their market. Solid year over year growth and company increased both revenues and earnings in 2008 and 2009 when the rest of the world was in meltdown mode. Ready to launch in Japan.

MGM Resorts (MGM 23.52) Operates 15 casinos in NV, MS, and MI. Biggest growth driver comes from a 51% interest in MGM Macau with gaming revenues up 20% and a 2nd Macau casino in planning. Las Vegas experiencing continued recovery. Looking at expansion into Japan.

WebMD (WBMD 39.50) Provides health information to consumers, physicians and other medical professionals. Both consumer and professional portals continue to grow and company continues to gain more advertising revenue. Revenue and earnings targets continue to rise.

Charles Schwab (SCHW 26.00) Continues to gain new market share away from other competitors. Simply stated, the company builds a better mouse trap. A bull market for stocks directly benefit the company. Anticipate solid gains in both revenue and profits for 2014. Dividend yield 0.9%

Chicago Bridge & Iron (CBI 83.14) A leading engineering, procurement and construction firm with projects all over the world. Oil and gas contracts likely to keep rising and nuclear power plants need more ongoing maintenance, all part of the company's business mix. Dividend yield 0.2%

Boeing (BA 136.49) Orders for aircraft keep rising. Despite a few recent issues surrounding the launch of the new 787 Dreamliner, the company has a backlog of orders for 890 planes and 131 new orders in 2013 with just one Dreamliner cancellation. Airlines are more profitable than ever and must replace their aging fleet. Dividend yield 2.9%

Hexcel (HXL 44.69) produces a lightweight carbon fiber material used in the production of aircraft. The Airbus 350 expected to launch in 2014 a big user of this material. Boeing and Airbus are biggest users, representing about 50% of sales. Has plants in 12 countries.

Wendy's (WEN 8.72) has launched an aggressive "Image Activation" program where company is remodeling many of its restaurants. Has also sold 425 company owned restaurants to franchisees. Earnings momentum has started to build, should continue into 2014. Dividend yield 2.2%

Northrup Grumman (NOC 114.61) A leading maker of airborne systems (drones) and designer of electronic warfare items. Makes space systems, got rid of shipbuilding in 2011. Attractive dividend yield of 2.4% and dividend was still raised each year in 2008 and 2009 despite overall market meltdown.

Tractor Supply (TSCO 77.58) Specialty retailer supplying the lifestyle needs of recreational and professional farmers and ranchers. Provides livestock and pet products, snow blowers, truck and towing accessories. Operates 1245 stores in 48 states, mostly in rural communities. Both sales and earnings on the move higher. Dividend yield 0.5%.

Dow Jones 16576.66

S&P 500 1847.36

Nasdaq Composite 4176.59