

AbbVie (ABBV 65.44) A global research based biopharmaceutical company that engages in the development and marketing of advanced therapies for some of the world's most complex diseases. Products include treatments for arthritis, psoriasis, Crohn's, HIV, cystic fibrosis, thyroid disease and Parkinson's plus others. Recently cut price on Hepatitis C drug to gain favorable status with distributor Express Scripts.

Comcast (CMCSA 58.01) The nation's leading cable TV provider with over 22 million subscribers. Also owns NBC, Bravo and USA networks and Universal Pictures film studio. Throw in the hockey team Philadelphia Flyers and Wells Fargo Center stadium and this corporation has a broad reach into the US consumer's pocket book. In the process of acquiring Time Warner Cable which will likely reduce competition and allow Comcast to raise prices for cable services.

Correction Corp of America (CXW 36.34) A real estate investment trust that owns and operates prisons and other detention facilities. Controls 53 facilities in 20 states plus DC with a capacity of about 86,000 inmates. Both revenues and bottom line profits have been increased at a steady rate in recent years. A very attractive dividend yield of 5.3%.

CyberArk (CYBR 39.65) The company provides information technology security solutions that protect organizations from cyber-attacks. The company's software products seek to protect, monitor, alert and respond to cyber-attacks. Presently, the company has about 1500 corporate clients and serves about 30 of the largest Fortune 100 companies. All corporations of all sizes are likely to increase spending budgets to protect the integrity of the information that they hold on their data servers. Expect sales and profits to rise in years ahead.

Disney (DIS 94.19) Owns media networks ABC and ESPN, theme parks, a cruise line, movie studio entertainment and wide range of consumer products. Regularly creates new franchises from successful movie launches that have many years of sales for related merchandise, the most recent was Frozen. Bought the Star Wars franchise from Lucas several years ago and is preparing to launch its newest movie in about a year. Star Wars merchandise has long term and lasting shelf life and expect this to be the hot item for Christmas sales in 2015.

Hilton Worldwide (HLT 26.09) One of the world's largest hospitality companies with over 4000 hotels and timeshare properties. In total, over 665,000 rooms and located in 90 countries. Owns brands Hilton, Waldorf Astoria, Conrad, DoubleTree, Embassy Suites, Hampton Inn and Homewood Suites. The combination of an improving economy and low gas prices put both business and leisure travel on the increase allowing higher occupancy rates and higher room prices. Selling the Waldorf in NYC to a Chinese insurance company for \$1.95 billion. Expect profits to accelerate in 2015.

Iron Mountain (IRM 38.66) The leading provider of document shredding services. The company services more than 90,000 corporate clients and operates more than 1000 facilities in about 165 markets worldwide. Since 1998, the company has acquired more than 44 records management providers thereby reducing its competition. Business just can't throw documents in the trash can any longer and have no other choice than to protect the privacy of both self and customers. An attractive dividend yield of 4.7%

Lockheed Martin (LMT 192.57) Provides a broad range of products and services to the world's governments and commercial customers. Areas of concentration include space and missile systems, electronics, aeronautics, and information systems. Projects include F-16, F-22, F-35 aircraft, the C-130 military transport, plus other missile systems. After the 2016 election, incoming president will have no other choice than to try and turn back the advance of the Islamic Military State, (ISIS), Taliban, North Korea, Iran, and Al-Qaeda. And who knows what kind of risk that Russia and China pose? Not such a safe world anymore.

Mobileye (MBLY 40.56) Designs and develops software and related technologies for camera based advanced driver assistance systems. The company's software algorithms and EyeQ system on a chip perform detailed interpretations of the visual field in order to anticipate possible collisions with other vehicles or pedestrians. This technology is available in many high end vehicles today and has the potential to be a mainstream product in every vehicle in the future. Working on technology for a driverless car.

Robert Half International (RHI 58.38) The largest provider of temporary and permanent personnel in the fields of finance and accounting. Provides staffing for administrative, clerical, paralegal support and IT positions. The company was founded in 1948 and has continually expanded through acquisitions for all of those years. The staffing demand in the US has been strengthening in recent years where professionals with specialized skills are highly sought and well paid. The corporate trend has been to replace full time permanent employees with temps to avoid providing expensive benefits and health insurance. A strong pickup in the job market, firmer pricing and solid profit margins are all good news for shareholders.

United Healthcare (UNH 101.09) Offers health and well-being products through four segments: UnitedHealthcare, OptumHealth, OptumInsight and OptumRx. This company is thriving due to the sweeping reform in the health care sector. All business units are set to grow in 2015 according to management's rosy outlook. Since the law requires that every American have health insurance of some type, the biggest beneficiary of this law are the companies that sell the insurance.

Yelp (YELP 54.73) through its web site and mobile app, the company provides individuals with information and reviews on local businesses. Users write reviews and rate their experiences at almost every type of business including restaurants, salons and retailers. The majority of revenues are generated from the sale of advertising. International expansion continues to progress and the company has plenty of domestic growth potential too. Yelp is now in 29 countries and available in 16 languages. Has been a takeover rumor.

Closing prices as of 12/31/2014