

Cable and Satellite

Craig Moffett

Jay Li

Jessica Moffett

Company	Ticker
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1 Cable One, Inc.	CABO
2 Charter Communications, Inc. Class A	CHTR
3 Comcast Corporation Class A	CMCSA
4 EchoStar Corporation Class A	SATS
5 T-Mobile US, Inc.	TMUS

IT Hardware

Craig Moffett
 Clay Griffin
 Brendan Haselton

Company	Ticker
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1 Apple Inc	AAPL
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Telecom

Craig Moffett
 Jay Li
 Jessica Moffett

Company	Ticker
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| 1 AT&T Inc. | T |
| 2 T-Mobile US, Inc. | TMUS |
| 3 Verizon Communications Inc. | VZ |

Media, Internet & Ad Agency

Michael Nathanson

Robert Fishman

James Caceres

Luke Landis

Carrington Akosa

Company	Ticker
1 Alphabet Inc. Class A	GOOGL
2 Cinemark Holdings, Inc.	CNK
3 DraftKings, Inc. Class A	DKNG
4 Flutter Entertainment Plc	FLTR-GB
5 Fox Corporation Class A	FOXA
6 Interpublic Group of Companies, Inc.	IPG
7 Meta Platforms Inc Class A	META
8 Netflix, Inc.	NFLX
9 Omnicom Group Inc	OMC
10 Paramount Global Class B	PARA
11 Roku, Inc. Class A	ROKU
12 Snap, Inc. Class A	SNAP
13 TKO Group Holdings, Inc. Class A	TKO
14 Walt Disney Company	DIS
15 Warner Bros. Discovery, Inc. Series A	WBD
16 WPP Plc	WPP-GB

Communications Infrastructure

Nick Del Deo

William Hunt

Company		Ticker
1	American Tower Corporation	AMT
2	Cogent Communications Holdings Inc	CCOI
3	Crown Castle Inc.	CCI
4	Digital Realty Trust, Inc.	DLR
5	Equinix, Inc.	EQIX
6	Frontier Communications Parent, Inc.	FYBR
7	Lumen Technologies, Inc.	LUMN
8	SBA Communications Corp. Class A	SBAC

Video Games

Clay Griffin
 Brendan Haselton

	Company	Ticker
1	Electronic Arts Inc.	EA
2	Nintendo	7974
3	Roblox Corp. Class A	RBLX
4	Take-Two Interactive Software, Inc.	TTWO

E-Commerce and Internet Marketplace

Michael Morton

Daniel Whitaker

Brian Liss

Company	Ticker
1 Amazon.com, Inc.	AMZN
2 Chewy, Inc. Class A	CHWY
3 DoorDash, Inc. Class A	DASH
4 eBay Inc.	EBAY
5 Etsy, Inc.	ETSY
6 Lyft, Inc. Class A	LYFT
7 Maplebear Inc.	CART
8 Shopify, Inc. Class A	SHOP-CA
9 Uber Technologies, Inc.	UBER
10 Wayfair, Inc. Class A	W