

Cable and Satellite

Craig Moffett

Jay Li

Jessica Moffett

Updated on 05/06/2024

	Company	Ticker	Rating	Price Target (\$)	Closing Price (\$)	Market Cap (\$MM)
1	Altice USA, Inc. Class A	ATUS	Neutral	2.00	1.98	538
2	Cable One, Inc.	CABO	Buy	615.00	378.45	2,127
3	Charter Communications, Inc. Class A	CHTR	Buy	660.00	265.93	38,397
4	Comcast Corporation Class A	CMCSA	Buy	57.00	38.69	151,866
5	EchoStar Corporation Class A	SATS	Neutral	8.00	17.45	2,445

Telecom

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	Company	Ticker	Rating	Price Target (\$)	Closing Price (\$)	Market Cap (\$MM)
1	AT&T Inc.	T	Neutral	18.00	16.85	120,817
2	T-Mobile US, Inc.	TMUS	Neutral	190.00	164.60	192,887
3	Verizon Communications Inc.	VZ	Neutral	45.00	38.89	163,698

Media, Internet & Ad Agency

Michael Nathanson

Robert Fishman

James Caceres

Luke Landis

Carrington Akosa

Updated on 05/06/2024

	Company	Ticker	Rating	Price Target (\$)	Closing Price (\$)	Market Cap (\$MM)
1	Alphabet Inc. Class A	GOOGL	Buy	185.00	167.24	1,933,441
2	AMC Networks Inc. Class A	AMCX	Neutral	14.00	11.85	386
3	Cinemark Neutralings, Inc.	CNK	Neutral	17.00	17.72	2,155
4	DraftKings, Inc. Class A	DKNG	Buy	56.00	41.82	19,807
5	Flutter Entertainment	FLUT	Buy	240.00	196.38	35,677
6	Fox Corporation Class A	FOXA	Buy	44.00	32.11	14,652
7	Interpublic Group of Companies, Inc.	IPG	Neutral	31.00	30.72	11,594
8	Meta Platforms Inc Class A	META	Buy	520.00	451.96	990,446
9	Netflix, Inc.	NFLX	Neutral	505.00	579.34	249,675
10	Omnicom Group Inc	OMC	Neutral	93.00	92.75	18,164
11	Paramount Global Class B	PARA	Neutral	12.00	12.89	8,979
12	Roku, Inc. Class A	ROKU	Sell	56.00	59.11	7,497
13	Snap, Inc. Class A	SNAP	Neutral	8.00	16.25	22,693
14	TKO Group Neutralings, Inc. Class A	TKO	Neutral	98.00	98.32	7,933
15	Walt Disney Company	DIS	Buy	135.00	113.66	208,487
16	Warner Bros. Discovery, Inc. Series A	WBD	Neutral	11.00	7.97	19,528
17	WPP Plc	WPP-GB	Neutral	10.04	10.20	10,997

Communications Infrastructure

Nick Del Deo

William Hunt

Updated on 05/06/2024

	Company	Ticker	Rating	Price Target (\$)	Closing Price (\$)	Market Cap (\$MM)
1	American Tower Corporation	AMT	Buy	216.00	181.74	84,868
2	Cogent Communications Neutralings Inc	CCOI	Buy	100.00	63.07	2,991
3	Crown Castle Inc.	CCI	Buy	119.00	97.39	42,318
4	Digital Realty Trust, Inc.	DLR	Neutral	122.00	147.00	45,926
5	Equinix, Inc.	EQIX	Buy	940.00	700.18	66,252
6	Frontier Communications Parent, Inc.	FYBR	Buy	28.00	25.62	6,298
7	Lumen Technologies, Inc.	LUMN	Sell	1.00	1.32	1,340
8	SBA Communications Corp. Class A	SBAC	Buy	262.00	193.09	20,875

Video Games

Clay Griffin
Brendan Haselton

Updated on 05/06/2024

	Company	Ticker	Rating	Price Target (\$)	Closing Price (\$)	Market Cap (\$MM)
1	Electronic Arts Inc.	EA	Neutral	125.00	129.56	34,638
2	Nintendo	7974	Buy	¥9,400	¥7,575	63,855
3	Roblox Corp. Class A	RBLX	Sell	31.00	39.24	22,820
4	Take-Two Interactive Software, Inc.	TTWO	Neutral	160.00	145.88	24,885

E-Commerce and Internet Marketplace

Michael Morton
Daniel Whitaker
Brian Liss

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	Company	Ticker	Rating	Price Target (\$)	Closing Price (\$)	Market Cap (\$MM)
1	Amazon.com, Inc.	AMZN	Buy	246.00	186.21	1,937,818
2	Chewy, Inc. Class A	CHWY	Neutral	18.00	15.91	2,165
3	DoorDash, Inc. Class A	DASH	Buy	155.00	113.81	43,438
4	eBay Inc.	EBAY	Neutral	49.00	49.65	25,123
5	Etsy, Inc.	ETSY	Neutral	65.00	59.97	7,012
6	Lyft, Inc. Class A	LYFT	Neutral	13.00	17.20	6,787
7	Maplebear Inc.	CART	Neutral	37.00	36.70	9,781
8	Shopify, Inc. Class A	SHOP-CA	Buy	78.96	74.48	89,967
9	Uber Technologies, Inc.	UBER	Buy	92.00	69.23	144,105
10	Wayfair, Inc. Class A	W	Neutral	42.00	63.59	6,120