

# EQUITY RESEARCH TEAM



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# EQUITY COVERAGE UNIVERSE



## Oil & Gas Exploration & Production

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Cabot Oil & Gas Corp. (COG)  
Callon Petroleum Company (CPE)  
Carrizo Oil & Gas, Inc. (CRZO)  
Centennial Resource Development Inc. (CDEV)  
Cimarex Energy Corp. (XEC)  
Comstock Resources, Inc. (CRK)  
Concho Resources Inc. (CXO)  
Contango Oil & Gas Company (MCF)  
Diamondback Energy, Inc. (FANG)  
Eclipse Resources Corp. (ECR)  
Goodrich Petroleum Corp. (GDP)  
Halcón Resources Corp. (HK)  
HighPoint Resources Corporation (HPR)  
Jagged Peak Energy Inc. (JAG)  
Legacy Reserves (LGCY)  
Lilis Energy, Inc. (LLEX)  
Matador Resources Company (MTDR)  
Parsley Energy, Inc. (PE)  
PDC Energy Inc. (PDCE)  
Rosehill Resources Inc. (ROSE)  
Sanchez Energy Corp. (SN)  
SM Energy Company (SM)  
Whiting Petroleum Corp. (WLL)  
WildHorse Resource Development Corporation (WRD)  
WPX Energy, Inc. (WPX)

Abraxas Petroleum Corp. (AXAS)  
Anadarko Petroleum Corp. (APC)  
Apache Corp. (APA)  
Brigham Minerals, Inc. (MNRL)  
Continental Resources, Inc. (CLR)  
Devon Energy Corp. (DVN)  
Earthstone Energy, Inc. (ESTE)  
Gulfport Energy Corp. (GPOR)  
Jones Energy, Inc. (JONE)  
Lonestar Resources Ltd. (LONE)  
Marathon Oil Corp. (MRO)  
Northern Oil and Gas, Inc. (NOG)  
Oasis Petroleum Inc. (OAS)  
PetroQuest Energy, Inc. (PQUE)  
Pioneer Natural Resources Company (PXD)  
SRC Energy Inc. (SRCI)  
Sundance Energy Corporation (SNDE)  
Talos Energy Inc. (TALO)  
W&T Offshore, Inc. (WTI)

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Oilfield Services & Equipment		Energy Infrastructure/MLPs
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<p>Baker Hughes, a GE company (BHGE)            Basic Energy Services, Inc. (BAS)            C&amp;J Energy Services, Inc. (CJ)            Diamond Offshore Drilling Inc. (DO)            Energy Recovery, Inc. (ERII)            Ensco plc (ESV)            Fairmount Santrol Holdings Inc. (FMSA)            Flotek Industries Inc. (FTK)            Frank's International NV (FI)            Halliburton Company (HAL)            Helmerich &amp; Payne Inc. (HP)            Hi-Crush Partners LP (HCLP)            Hornbeck Offshore, Inc. (HOS)            Key Energy Services Inc. (KEG)            National Oilwell Varco, Inc. (NOV)            Natural Gas Services Group, Inc. (NGS)</p>	<p>Noble Corp. (NE)            Oceaneering International, Inc. (OII)            Patterson-UTI Energy Inc. (PTEN)            Pioneer Energy Services (PES)            RPC Inc. (RES)            Schlumberger Limited (SLB)            Seadrill Limited (SDRL)            Select Energy Services Inc. (WTTR)            Smart Sand Inc. (SND)            Solaris Oilfield Infrastructure Inc. (SOI)            Superior Energy Services, Inc. (SPN)            TechnipFMC plc (FTI)            Tesco Corporation (TESO)            Transocean Ltd. (RIG)            U.S. Silica Holdings, Inc. (SLCA)            U.S. Well Services, Inc. (USWS)            Weatherford International Ltd. (WFT)</p>	<p>ONEOK Inc. (OKE)            Plains All American Pipeline, L.P. (PAA)            Plains GP Holdings, L.P. (PAGP)            Targa Resources Corp (TRGP)            Tellurian Inc. (TELL)            Williams Companies, Inc. (WMB)</p>

# EQUITY COVERAGE UNIVERSE



<b>Coal; Gas Utilities; Railroads; Steel</b>	<b>Specialty Chemicals; Coatings</b>
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<p><b>Coal</b> Alliance Resource Partners LP (ARLP) Arch Coal, Inc. (ARCH) CONSOL Coal Resources LP (CCR) CONSOL Energy Inc. (CEIX) Contura Energy, Inc. (CTRA) Natural Resource Partners LP (NRP) Peabody Energy Corporation (BTU) Ramaco Resources, Inc (METC) SunCoke Energy, Inc. (SXC) Teck Resources Limited (TECK) Warrior Met Coal, Inc. (HCC)</p> <p><b>Gas Utilities</b> Atmos Energy Corp. (ATO) Chesapeake Utilities Corp. (CPK) New Jersey Resources Corp. (NJR) ONE Gas Inc. (OGS) RGC Resources Inc. (RGCO)</p> <p><b>Railroads</b> Canadian National Railway (CNI) Canadian Pacific Railway Limited (CP) CSX Corporation (CSX) Kansas City Southern (KSU) Norfolk Southern Corp. (NSC) Union Pacific Corporation (UNP)</p> <p><b>Metals &amp; Mining</b> Cleveland-Cliffs Inc. (CLF)</p>	<p><b>Specialty Chemicals</b> Air Products &amp; Chemicals Inc. (APD) Albemarle Corporation (ALB) Ashland Inc. (ASH) Cabot Microelectronics Corporation (CCMP) Ecolab Inc. (ECL) Entegris Inc. (ENTG) Ferro Corporation (FOE) FMC Corp. (FMC) GCP Applied Technologies Inc. (GCP) HB Fuller Co. (FUL) Huntsman Corporation (HUN) Koppers Holdings Inc. (KOP) Linde plc (LIN) Livent Corporation (LTHM) PolyOne Corporation (POL) Quaker Chemical Corp. (KWR) Stepan Company (SCL) W. R. Grace &amp; Co. (GRA) Valvoline Inc. (VVV)</p> <p><b>Coatings</b> Axalta Coating Systems Ltd. (AXTA) PPG Industries Inc. (PPG) RPM International Inc. (RPM) Sherwin-Williams Company (SHW)</p> <p><b>Other</b> Par Pacific Holdings, Inc. (PARR)</p>

# EQUITY COVERAGE UNIVERSE



Airfreight & Logistics; Maritime; Trucking	Automotive
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<p><b><i>Airfreight &amp; Logistics</i></b>            Air Transport Services Group, Inc. (ATSG)            Atlas Air Worldwide Holdings Inc. (AAWW)            Expeditors International of Washington, Inc. (EXPD)            FedEx Corporation (FDX)            Forward Air Corp. (FWRD)            Hub Group Inc. (HUBG)            Radiant Logistics, Inc. (RLGT)            Ryder System, Inc. (R)            United Parcel Service, Inc. (UPS)            World Fuel Services Corp. (INT)            XPO Logistics, Inc. (XPO)</p> <p><b><i>Maritime</i></b>            Kirby Corporation (KEX)            Matson, Inc. (MATX)            Seaspan Corporation (SSW)</p> <p><b><i>Trucking</i></b>            ArcBest Corporation (ARCB)            Covenant Transportation Group, Inc. (CVTI)            Daseke, Inc. (DSKE)            Heartland Express, Inc. (HTLD)            Knight-Swift Transportation Holdings Inc. (KNX)            Marten Transport Ltd. (MRTN)            Old Dominion Freight Line Inc. (ODFL)            SAIA, Inc. (SAIA)            Werner Enterprises Inc. (WERN)            YRC Worldwide Inc. (YRCW)</p>	<p>Adient plc (ADNT)            AutoNation Inc. (AN)            Aptiv PLC (APTV)            BorgWarner Inc. (BWA)            Carvana Co. Cl A (CVNA)            Cooper-Standard Holdings Inc. (CPS)            Delphi Technologies PLC (DLPH)            Ford Motor Company (F)            General Motors Company (GM)            Group 1 Automotive Inc. (GPI)            Lear Corp. (LEA)            Lithia Motors Inc. Cl A (LAD)            Lyft, Inc. (LYFT)            Penske Automotive Group Inc. (PAG)            Superior Industries, Inc. (SUP)            Tower International, Inc. (TOWR)</p>

# EQUITY COVERAGE UNIVERSE



Building Products & Furnishings	Paper & Forest Products; Building Products;
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<p><b>Commercial Interiors</b>            Herman Miller, Inc. (MLHR)            HNI Corp (HNI)            Interface, Inc. (TILE)            Knoll Inc (KNL)            Steelcase Inc. (SCS)</p> <p><b>Diversified Commercial</b>            Acuity Brands, Inc (AYI)            Belden Inc. (BDC)</p> <p><b>Building Products</b>            Beacon Roofing Supply Inc. (BECN)            BMC Stock Holdings, Inc. (BMCH)            Builders FirstSource, Inc. (BLDR)            GMS Inc. (GMS)            Installed Building Products Inc. (IBP)            Select Interior Concepts, Inc. (SIC)            TopBuild Corp. (BLD)            Trex Co. Inc. (TREX)</p>	<p><b>Wood Building Products</b>            Boise Cascade Company (BCC)            Continental Building Products Inc. (CBPX)            JELD-WEN Holding, Inc. (JELD)            Masonite International Corp. (DOOR)            NCI Building Systems Inc. (NCS)            Owens Corning (OC)            Quanex Building Products Corporation (NX)            Universal Forest Products Inc. (UFPI)</p> <p><b>Paper &amp; Forest Products</b>            Graphic Packaging Holding Company (GPK)            International Paper Company (IP)            Packaging Corp. Of America (PKG)            PotlatchDeltic Corporation (PCH)            Rayonier Inc. (RYN)            WestRock Company (WRK)            Weyerhaeuser Co. (WY)</p> <p><b>Building Products</b>            Louisiana-Pacific Corp. (LPX)            Norbord, Inc. (OSB)</p>

# EQUITY COVERAGE UNIVERSE



## Aerospace & Defense; Aerospace Materials

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### *Aerospace & Defense*

AAR Corp. (AIR)  
 Air Lease Corp. (AL)  
 Astronics Corporation (ATRO)  
 BWX Technologies Inc. (BWXT)  
 CACI International Inc. (CACI)  
 FLIR Systems, Inc. (FLIR)  
 Harris Corporation (HRS)  
 HEICO Corp. (HEI)  
 Huntington Ingalls Industries, Inc. (HII)  
 Jacobs Engineering Group Inc. (JEC)  
 Kratos Defense & Security Solutions, Inc. (KTOS)  
 PTC Inc. (PTC)  
 RBC Bearings Incorporated (ROLL)  
 Spirit AeroSystems Holdings Inc. (SPR)  
 Science Applications International Corporation (SAIC)  
 The Boeing Company (BA)  
 The KEYW Holding Corporation (KEYW)  
 United Technologies Corporation (UTX)

### *Aerospace Materials*

Arconic Inc. (ARNC)  
 Allegheny Technologies Inc. (ATI)  
 Constellium N.V. (CSTM)  
 Carpenter Technology Corporation (CRS)  
 Kaiser Aluminum Corporation (KALU)

## Diversified Industrials; Flow Control

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### *Diversified*

Colfax Corporation (CFX)  
 Columbus McKinnon Corporation (CMCO)  
 Curtiss-Wright Corp. (CW)  
 Federal Signal Corp. (FSS)  
 Gibraltar Industries, Inc. (ROCK)  
 Graco Inc. (GGG)  
 Illinois Tool Works Inc. (ITW)  
 John Bean Technologies Corporation (JBT)  
 Kadant Inc. (KAI)  
 Kennametal Inc. (KMT)  
 Lennox International, Inc. (LII)  
 Lincoln Electric Holdings, Inc. (LECO)  
 Nordson Corporation (NDSN)  
 Regal Beloit Corporation (RBC)  
 The Middleby Corporation (MIDD)  
 Watsco Inc (WSO)  
 Welbilt, Inc. (WBT)

### *Flow Control*

Chart Industries Inc. (GTLS)  
 Dover Corporation (DOV)  
 Flowserve Corporation (FLS)  
 Franklin Electric Co., Inc. (FELE)  
 IDEX Corporation (IEX)  
 ITT Corporation (ITT)  
 MRC Global Inc. (MRC)  
 Mueller Water Products, Inc. (MWA)  
 NOW Inc. (DNOW)  
 Pentair plc (PNR)  
 SPX FLOW, Inc. (FLOW)  
 Watts Water Technologies, Inc. (WTS)  
 Xylem Inc. (XYL)

## Cannabis; Ingredients

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### ***Cannabis***

Acreage Holdings Inc. (ACRGF)  
Aphria Inc. (APHA)  
Aurora Cannabis Inc. (ACB)  
Canopy Growth Corporation (CGC)  
Curaleaf Holdings Inc. (CURLF)  
Green Thumb Industries Inc. (GTBIF)  
HEXO Corp. (HEXO)  
iAnthus Capital Holdings, Inc. (ITHUF)  
KushCo Holdings, Inc. (KSHB)  
MedMen Enterprises Inc. (MMNFF)  
The Green Organic Dutchman Holdings Ltd. (TGODF)  
Tilray, Inc. (TLRY)

### ***Ingredients***

Balchem Corporation (BCPC)  
Ingredion Inc. (INGR)  
Innophos Holdings, Inc. (IPHS)  
International Flavors & Fragrances Inc. (IFF)  
Sensient Technologies Corporation (SXT)





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