

**Fullermoney.com List of companies with at least 20% revenue last quarter from Asia and/or Latin America
November 18th 2011**

Ticker	Short Name	AP,LA Geo %	Market Cap	Price	P/E	YTD	Revenue T12M
Consumer Discretionary (14 securities)							
WYNN US	WYNN RESORTS LTD	73.28%	1.51E+10	120.78	23.23	17.51	5163116928
YUM US	YUM! BRANDS INC	48.87%	24760899584	53.77	19.48	11.85	12076999680
PC IM	PIRELLI & C.	40.08%	3256392960	6.80	8.17	15.12	5211219200
DUFN SW	DUFRY AG-REG	37.48%	2541157888	94.95	22.07	-24.52	2522999936
TIF US	TIFFANY & CO	36.18%	9538051072	74.94	21.91	21.83	3416673984
ADS GR	ADIDAS AG	33.08%	10636550144	50.59	16.08	5.08	12921999872
WHR US	WHIRLPOOL CORP	30.45%	3845654016	50.31	5.00	-41.68	18796999680
DAI GR	DAIMLER AG	26.50%	33792090112	31.28	6.69	-36.06	10387000000
VOW3 GR	VOLKSWAGEN-PFD	25.00%	54118248448	124.00	3.14	3.96	15060700000
ELUXB SS	ELECTROLUX AB-B	23.71%	33409990656	108.00	12.07	-41.12	10078500000
MCD US	MCDONALDS CORP	22.35%	94432821248	92.29	18.03	22.94	26397400064
COH US	COACH INC	21.19%	17938558976	61.47	20.29	12.30	4297196928
IHG LN	INTERCONTINENTAL	20.09%	3106746880	1075.00	12.86	-11.10	1752000000
DTV US	DIRECTV-A	20.01%	32774270976	46.45	14.61	16.33	26384000512
Consumer Staples (12 securities)							
MJN US	MEAD JOHNSON	68.11%	14282090496	70.16	24.70	14.08	3569400000
AVP US	AVON PRODUCTS	56.98%	7353324032	17.07	9.23	-38.91	11423500032
ABI BB	ANHEUSER-BUSCH I	55.49%	68629970944	42.41	19.10	0.94	37750999040
CL US	COLGATE-PALMOLIV	47.87%	42611298304	88.04	17.71	12.50	16539999744
BATS LN	BRIT AMER TOBACC	44.59%	56976068608	2922.50	17.74	24.28	15051999744
UNA NA	UNILEVER NV-CVA	40.84%	74094542848	24.40	15.52	8.86	45155000320
PM US	PHILIP MORRIS IN	36.85%	1.25E+11	72.08	15.14	27.08	30463000064
HNZ US	HJ HEINZ CO	23.54%	16957589504	52.82	17.04	9.78	11292553216
BEI GR	BEIERSDORF AG	23.22%	1.04E+10	40.92	31.25	0.12	5765000064
KO US	COCA-COLA CO/THE	22.07%	1.51E+11	66.62	17.72	3.46	45996001280
HEN3 GR	HENKEL AG -PFD	21.52%	16220879872	41.20	14.95	-10.00	15532999936
EL US	ESTEE LAUDER	20.69%	21759479808	112.99	26.65	40.01	9195000064
Energy (4 securities)							
DO US	DIAMOND OFFSHORE	52.87%	8722567168	62.74	8.62	-1.41	3415028032
GA FP	CGGVERITAS	44.96%	2473072128	16.32		-28.36	2278500000
BTU US	PEABODY ENERGY	37.26%	9943794688	36.71	10.03	-42.25	7607100032
TEN IM	TENARIS SA	33.38%	1.52E+10	12.92	16.49	-28.92	9285799936

Financials (1 security)							
AFL US	AFLAC INC	77.86%	19586410496	41.96	6.79	-23.68	21485000192
Health Care (6 securities)							
EKTAB SS	ELEKTA AB-B	25.28%	27163549696	289.10	27.57	13.59	7705000064
SAN FP	SANOFI	23.88%	66562019328	49.77	15.53	8.85	31344000000
MRK US	MERCK & CO	22.99%	1.06E+11	34.84	9.49	0.03	47847000064
BAYN GR	BAYER AG-REG	22.87%	38568841216	46.36	20.56	-13.99	36348999680
JNJ US	JOHNSON&JOHNSON	20.38%	1.75E+11	63.94	13.05	6.16	64419000320
NOBN VX	NOBEL BIOCAR-REG	20.08%	1364105984	10.94	34.17	-36.80	567797000
Industrials (20 securities)							
EXPD US	EXPEDITORS INTL	52.53%	9064265728	42.75	23.62	-21.33	6230719104
ALFA SS	ALFA LAVAL AB	46.64%	51215618048	123.30	16.01	-11.04	27671999488
BEKB BB	BEKAERT NV	43.01%	1726029056	29.28	5.18	-64.75	3507293056
CAT US	CATERPILLAR INC	39.77%	60659458048	93.81	13.48	2.01	55701999616
PLL US	PALL CORP	38.15%	6020666880	52.34	18.69	7.03	2740915968
SCVB SS	SCANIA AB-B	37.77%	81160003584	104.00	8.00	-30.53	91579998208
SAND SS	SANDVIK AB	36.34%	94606401536	80.75	13.77	-36.85	92254998528
VOLVB SS	VOLVO AB-B	35.69%	1.60E+11	76.00	9.37	-34.42	297258000000
WRT1V FH	WARTSILA OYJ ABP	34.10%	4224904960	21.41	11.37	-20.96	4432000064
CMI US	CUMMINS INC	32.57%	18278469632	94.78	11.64	-12.65	17265999872
KNEBV FH	KONE OYJ-B	28.29%	10348499968	40.07	17.85	-1.46	5125199936
ABBN VX	ABB LTD-REG	27.72%	38100668416	16.62	13.47	-18.13	36597999616
SU FP	SCHNEIDER ELECTR	27.66%	21343860736	38.80	11.55	-28.86	21345000448
ALO FP	ALSTOM	27.09%	7145674240	24.34	16.98	-31.04	19879999488
TNTE NA	TNT EXPRESS	25.84%	2713839104	5.00			
MEO1V FH	METSO OYJ	25.62%	4096989952	27.51	13.00	-31.50	6259000064
ROK US	ROCKWELL AUTOMAT	24.58%	10003720192	70.49	14.72	0.39	6000399872
PRY IM	PRYSMIAN SPA	24.53%	2173697024	10.31		-18.26	6844999936
ISYS LN	INVENSYS PLC	22.38%	1591812992	199.00	8.91	-42.93	2568000000
SIE GR	SIEMENS AG-REG	20.54%	66426019840	72.28	9.37	-19.80	75401000960
Information Technology (34 securities)							
AIXA GR	AIXTRON SE	90.01%	958126016	9.35	6.12	-65.40	695526000
BRCM US	BROADCOM CORP-A	84.28%	17749270528	32.93	17.70	-23.82	7514554880
TER US	TERADYNE INC	76.00%	2492121088	13.54	11.19	-3.56	1454233984
QCOM US	QUALCOMM INC	74.53%	94773911552	56.38	19.71	15.25	14963000064
AMAT US	APPLIED MATERIAL	74.52%	15191140352	11.53	8.87	-16.51	10517000448
NVDA US	NVIDIA CORP	70.82%	8488407040	14.06	13.92	-8.70	3931111936

JBL US	JABIL CIRCUIT	69.77%	4211695104	20.23	10.65	2.19	16518826752
SNDK US	SANDISK CORP	67.28%	11899480064	49.52	10.09	-0.68	5412628096
INTC US	INTEL CORP	66.06%	1.24E+11	24.34	10.31	19.77	51568999424
LSI US	LSI CORP	65.87%	3206252032	5.69	29.95	-5.01	2185294048
KLAC US	KLA-TENCOR CORP	63.43%	7581564928	45.49	9.06	21.06	3289300992
MOLX US	MOLEX INC	63.00%	3880333056	23.87	13.26	7.65	3625647040
WDC US	WESTERN DIGITAL	59.00%	5905546240	25.26	7.22	-25.49	9824000256
ALTR US	ALTERA CORP	59.00%	11342510080	35.35	13.49	0.06	2162047936
MCHP US	MICROCHIP TECH	54.93%	6649461248	34.79	17.31	4.76	1462917984
NVLS US	NOVELLUS SYS	53.00%	2282683904	34.28	9.58	6.06	1454496000
NOK1V FH	NOKIA OYJ	52.52%	18148059136	4.88	27.57	-32.66	41304998912
LLTC US	LINEAR TECH CORP	51.79%	6983321088	30.66	12.83	-8.66	1425289984
ADI US	ANALOG DEVICES	48.85%	10630049792	35.50	12.33	-3.91	3047176064
IFX GR	INFINEON TECH	42.00%	6415038976	5.97	8.47	-13.26	3997000000
XLNX US	XILINX INC	41.80%	8335782912	31.76	14.12	12.08	2325714048
ERICB SS	ERICSSON LM-B	37.82%	2.23E+11	69.45	14.21	-8.56	226037000000
TEMN SW	TEMENOS GROU-REG	35.00%	1051404992	15.00	73.57	-61.44	496312008
AAPL US	APPLE INC	27.03%	3.51E+11	377.41	13.64	17.00	108249000000
DSY FP	DASSAULT SYSTEME	26.86%	7261402112	59.87	25.19	7.13	1733600000
ADSK US	AUTODESK INC	26.23%	7883009024	34.45	29.70	-9.82	2150900032
HEXAB SS	HEXAGON AB-B	25.79%	33331580928	94.25	23.39	-34.08	18851648512
JDSU US	JDS UNIPHASE	25.59%	2629852928	11.33	30.62	-21.75	1820100000
IBM US	IBM	24.81%	2.19E+11	185.73	14.33	28.70	106448000000
FFIV US	F5 NETWORKS	23.01%	8645847040	107.10	36.06	-17.72	1151834016
YHOO US	YAHOO! INC	22.76%	19026190336	15.34	18.48	-7.76	5185154944
JNPR US	JUNIPER NETWORKS	21.52%	11956160512	22.73	22.73	-38.43	4517892992
ADBE US	ADOBE SYS INC	20.97%	13592909824	27.69	15.73	-10.04	4072043008
HPQ US	HEWLETT-PACKARD	20.00%	54224338944	27.29	6.09	-34.48	128401000000

Materials (17 securities)

HOLN VX	HOLCIM LTD-REG	49.03%	1.66E+10	50.20	15.93	-27.42	20546000384
DD US	DU PONT (EI)	42.39%	42564947968	46.07	11.24	-4.60	36940000256
WCH GR	WACKER CHEMIE AG	37.85%	3692925952	70.64	6.62	-44.78	5108000000
DSM NA	DSM (KONIN)	37.25%	6424259072	35.70	7.97	-13.46	9167999744
LXS GR	LANXESS AG	35.62%	3192901888	38.62	6.05	-33.89	8484000000
SY1 GR	SYMRISE AG	34.07%	2262427904	19.44	18.40	-2.58	1570508032
PX US	PRAXAIR INC	32.73%	28995739648	96.73	18.18	2.87	11079000064
OI US	OWENS-ILLINOIS	31.40%	3176503040	19.34	8.37	-37.00	7268000128

DOW US	DOW CHEMICAL CO	30.50%	30951669760	26.19	9.42	-21.62	59658999808
AKZA NA	AKZO NOBEL	29.49%	7994221056	34.32	12.11	-23.99	15529999872
NZYMB DC	NOVOZYMES-B SHS	28.71%	53430001664	833.50	28.26	8.36	10324999936
EMN US	EASTMAN CHEMICAL	28.20%	5335237120	38.00	8.44	-8.08	6918000000
CHR DC	CHRISTIAN HANSEN	27.37%	16067179520	116.60	18.84	2.28	635600000
FPE3 GR	FUCHS PETRO-PFD	24.13%	2216350976	31.78	12.47	-11.88	1629700000
CLN VX	CLARIANT AG-REG	23.59%	2565650944	8.79	7.76	-53.31	7151999872
LG FP	LAFARGE SA	22.74%	7247255040	25.16	12.24	-45.11	16143000064
BAS GR	BASF SE	20.80%	45850451968	49.72	7.43	-13.94	71852998656
Telecommunication Services (1 security)							
TEF SM	TELEFONICA	52.07%	63302631424	13.79	15.55	-10.55	63129256960
Utilities (2 securities)							
AES US	AES CORP	73.84%	8819129344	11.49	10.17	-5.67	17552000000
ELE SM	ENDESA	29.19%	17141199872	16.08	5.07	-12.47	32523999744