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BARRON'S COVER

Barron's Roundtable: A Bevy of Bargains

By Lauren R. Rublin January 20, 2018

The number of publicly listed companies in the U.S. has fallen roughly by half in the past 20 years. You might think combing through a shorter stack of stocks would make it easier to identify future winners, but not a chance. Successful investing still requires rigorous research and hard-nosed analysis—the very things at which our Roundtable members, some of the country's best investors and market strategists, excel.

In last week's Roundtable issue, the focus was on economics and markets, which dominated the morning discussion at our annual gathering, held on Jan. 8 at the Harvard Club of New

York. This week's installment spotlights our experts' specific investment ideas for 2018—51 picks and pans, in all, including some that sell at deep discounts to competitors and others that sport lofty yields.

You'll get stock recommendations aplenty in the links below, ranging from Samsung Electronics (ticker: 005930.Korea) and Starbucks (SBUX) to MetLife (MET), Grubhub (GRUB), and Vail Resorts (MTN), and a few fund recommendations, too, such as Energy Select Sector SPDR (XLE), for those who favor thematic bets. Even more important, we hope, you'll gain a good feel for how some of the smartest folks on Wall Street practice their craft, examining companies and industries every which way to separate the would-be stars from the also-rans.

The stock market is richly priced, based on major indexes such as the Dow Jones Industrial Average and Standard & Poor's 500. But, as the Roundtable panelists deftly demonstrate, bargains are hiding in plain sight, their attractions apparent to those who do the legwork—and the math.

It's a lot of reading, we know. But we think you'll find it worthwhile to have all these names at once, and in one place, as you tune up your own portfolio for 2018.

- Henry Ellenbogen: The Case for a Credit Bureau, a Ski Resort, and More
- Mario Gabelli: Bullish on Media and Entertainment
- Jeffrey Gundlach: Bullish on Commodities and Bank Loans
- Abby Joseph Cohen: Drilling for Oil and Making Gadgets
- William Priest: Bullish on Screen Technology and Chip Gear
- Scott Black: Making Chips and Crushing Sand
- Meryl Witmer: Used Cars and Carbon Black
- Oscar Schafer: Loading Up on Auto Parts, Off to the Movies
- Paul Wick: How to Play the Big Trends in Tech

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