

	Pays Dividend	5+ Years	Frozen	Chowder	EPS < 70	Payout		Quality	Earnings	UV - Orange	UV - Blue		Notes
BASIC MATERIALS													
Chemical Manufacturing													
APD	X	X	X	X	X	X		?	X				PX has a much better payout ratio
MON	X	X	X	X	X	X		X	X		X		
PX	X	X	X	X	X	X		?	X		X		
Chemicals (Specialty)													
WDFC	X	X			X	X		X	X				
Misc. Fabricated Products													
DOV	X	X	X	X	X	X		?	X	X	X		
CAPITAL GOODS													
Aerospace & Defense													
LMT	X	X	X	X	X	X		X	X				Much worse payout ratio than RTN
RTN	X	X	X	X	X	X		?	X		X		
UTX	X	X	X		X	X		X	X		X		Not fond of the raise every 5 quarters
Construction & Agric. Machinery													
CAT	X	X	X	X	X	X		X	X	X	X		
DE	X	X	X	X	X	X		X	X	X	X		DE likes to keep the dividends constant
Construction - Supplies and Fixtures													
MMM	X	X	X	X	X	X		X	X				
CONSUMER CYCLICAL													
Apparel & Accessories													
VFC	X	X	X	X	X	X		X	X				
Appliance & Tool													
GWW	X	X	X	X	X	X		X	X		X		
SWK	X	X	X	X	X	X		?	X				
Auto & Truck Parts													
GPC	X	X	X		X	X		X	X				
ITW	X	X	X		X	X		X	X				
Footwear													
NKE	X	X	X	X	X	X		X	X				
CONSUMER NON-CYCLICAL													
Beverages (Alcoholic)													
BF/A	X	X	X	X	X	X		X	X				
BUD	X	X	X		X	X		?	X				Foreign - Belgium
DEO	X	X	X		X	X		?	X				Foreign - UK
Beverages (Non-Alcoholic)													
NSRGY	X	X	X	X				?	X				Annual; Can get my exposure with HSY, KO, PEP
PEP	X	X	X	X	X	X		X	X				
Food Processing													

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BASIC MATERIALS													
GIS	X	X	X	X	X	X		X	X				
HRL	X	X	X	X	X	X		X	X				
INGR	X	X	X	X	X	X		X	X				Can get my exposure elsewhere
MKC	X	X	X	X	X	X		?	X				
SJM	X	X	X	X	X	X		X	X				
Personal & Household Products													
CHD	X	X	X	X	X	X		X	X				
CL	X	X	X	X	X	X		?	X				
Tobacco													
MO	X	X	X	X		X		X					Earnings dropped with PM spinoff
RAI	X	X	X	X		X			X				MO has SABMiller stake for diversification
ENERGY													
Oil & Gas Operations													
XOM	X	X	X	X	X	X		X	X	X	X		
Oil Well Services & Equipment													
HP	X	X	X	X	X	X		?	X	X	X		
FINANCIAL													
Consumer Financial Services													
MA*	X			X	X	X		?	X	X			
Insurance (Accident & Health)													
AFL	X	X	X		X	X		X	X	X	X		
Investment Services													
BEN	X	X	X	X	X	X			X	X	X		
HEALTHCARE													
Medical Equipment & Supplies													
BCR	X	X	X		X	X		?	X				
BDX	X	X	X	X	X	X		X	X				
MDT	X	X	X	X	X	X		?	X		X		
SYK	X	X	X	X		X		X	X		X		
SERVICES													
Broadcasting & Cable TV													
DIS	X	X	X	X	X	X		X	X				Payout now qualifies under DIS exception
Business Services													
ACN	X	X	X	X	X	X		?	X				Foreign - Ireland; ADP, V pay quarterly
ADP	X	X	X	X	X	X		X	X				
V	X	X	X	X	X	X		?	X				

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BASIC MATERIALS													
Communication Services													
CMCSA	X	X	X	X	X	X		X	X	X	X		
Personal Services													
SCI*	X				X	X			X				Has a virtual monopoly on death care services
Real Estate Operations													
DLR	X	X	X	X	?	X		X	X	X	X		REIT
FRT	X	X	X		?	X		X	X				REIT
OHI	X	X	X	X	?	X		X	X		X		REIT; Often has flat earnings
SKT	X	X	X		?	X		X	X				REIT
WPC	X	X	X	X	?	X		X					REIT; Earnings growth is meh
Rental & Leasing													
HCP	X	X	X	X	?	X		X	X	X	X		REIT
VTR	X	X	X	X	?	X			X				REIT
Retail (Drugs)													
CVS	X	X	X	X	X	X		?	X				
WBA	X	X	X	X	X	X		X	X				
Retail (Grocery)													
SBUX	X	X	X	?	X	X		?	X		X		Chowder number is unknown
WMT	X	X	X	X	X	X		X	X		X		
Waste Management Services													
RSG	X	X	X		X	X		X	X				
TECHNOLOGY													
Computer Services													
FB*									X		X		Tech growth stock, not DG stock
Scientific & Technical Instruments													
EMR	X	X	X		X	X		X	X	X	X		
Software & Programming													
BR	X	X	X	X	X	X			X				Controls the proxy service industry
TRANSPORTATION													
Air Courier													
UPS	X	X	X		X	X			X		X		
Airline													
CPA	X	X	X	X	X	X		?	X	X	X		
Railroads													
CNI	X	X	X	X	X	X		X	X				
CSX	X	X	X	X	X	X		X	X				
UNP	X	X	X	X	X	X		X	X				

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BASIC MATERIALS													
UTILITIES													
Electric													
BIP	X	X	X	X	?	X		?	X	X			Utility; MLP
NEE	X	X	X	X	X	X		X	X				Utility
SO	X	X	X	X		X		X	X				Utility
WEC	X	X	X	X	X	X		X	X				Utility
Water													
AWK	X	X	X	X	X	X		?	X				Utility
AWR	X	X	X	X	X	X		X	X				Utility
WTR	X	X	X	X	X	X		X	X		X		Utility