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DOW JONES

In a year in which risk was rewarded, Dimensional Fund Advisors, Nuveen, Principal, Oppenheimer and Waddell & Reed head our winners.



PREVIEW

| SATURDAY, FEBRUARY 5, 2011

Top Pickers: Mining for Good Ideas

By ROBIN GOLDWYN BLUMENTHAL

An independent research firm takes top spot in First Coverage rankings.

A focus on long positions in mining and manufacturing tied to the global recovery was the ticket to winning the 2010 top spot in First Coverage's rankings.

John Tumazos Very Independent Research, a boutique research provider to some 50 customers, captured the top spot among 350 sell-side and independent research firms around the world. Turner Grant, of SunTrust Robinson Humphrey, placed first among institutional sales people ranked by the data-tracking firm. (For a list of the top five in each category, see ["Where the Thrills and Chills Will Be in 2011."](#))

Tumazos had four stocks that rose more than 50% in 2010, which helped him outperform the Standard & Poor's 500 Index by seven percentage points. The winners included **Antofagasta** (ticker: ANTO.U.K.), a Chilean copper miner, and [General Moly](#) (GMO), a small-cap company that makes the hardening agent for steel. Other picks included [Alcoa](#) (AA), [Agnico-Eagle](#) (AGNIX) and [Thompson Creek Metals](#) (TC).

This year will be a bit more challenging, Tumazos says: "We have a hard time finding stocks with 50% appreciation now." Tumazos, who spent a long time on Wall Street as an analyst before starting his own shop in 2007, is ready: "More of our stocks look like singles and doubles, and not grand slams or home runs."

Though he thinks markets are still recovering from the troughs of a few years ago, and the world economy is still growing, he has seen some recent evidence of speculators cashing out of commodities.

High on his list of picks? Big diversified mines, and paper companies like [Louisiana-Pacific](#) (LPX).