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PETER RUSSELL
Russell Research

BUY

ACONEX (ACX)

The #1 cloud collaboration platform connecting global construction project teams. Expect this year's maiden profit to at least triple by 2018.

\$6.49

eMERCHANTS (EML)

Its reloadable card services are growing rapidly, helping clients from gaming to stores to services to build their customers.

\$1.49

HOLD

ADELAIDE BRIGHTON (ABC)

We expect the leader in cement, concrete, aggregates and lime to meet or beat last year's record, on top of a five-year outperformance.

\$5.69

EVENT HOSPITALITY & ENTERTAINMENT (EVT)

Its Rydges Hotels, hospitality, leisure and cinema businesses have a sound growth record, now enjoying both domestic and inbound tourism.

\$14.97

SELL

CHARTER HALL RETAIL REIT (CQR)

Its smaller malls, and supermarket exposures may restrict rental growth. A sought-after yield has fuelled the share, now highly priced: lighten.

\$4.79

SHOPPING CENTRES AUSTRALASIA PROPERTY GROUP (SCP)

A focus on smaller shopping centres, and two thirds of its rentals from Woolworths, may restrain incomes.

\$2.27