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**COMPANIES MENTIONED IN THIS REPORT:**

**CORE COVERAGE**

COMPANY	TICKER	PAGE
<b>QSR</b>		
McDonald's	MCD	9
Sonic	SONC	10
Burger King	BKW	11
Wendy's	WEN	12
Jack in the Box	JACK	13
Popeye's	PLKI	14
KFC	YUM	15
Taco Bell	YUM	16
Pizza Hut	YUM	17
Domino's	DPZ	18

**FAST CASUAL**

Chipotle	CMG	19
Krispy Kreme	KKD	20
Panera Bread	PNRA	21
Starbucks	SBUX	22

**CASUAL**

Applebee's	DIN	23
IHOP	DIN	24
Buffalo Wild	BWLD	25
Chili's	EAT	26
Chuy's	CHUY	27
Red Robin	RRGB	28
Ruby Tuesday	RT	29

**OCTOBER HEADLINES:**

**Industry:**

- **QSR Sector Renews Focus on Discounts**
- **McDonald's Rivals Send Out Tweets:**
  - Remind customers they have had "All Day Breakfast" all along
- **Recent Gallup Consumer Survey Finds:**
  - 27% of consumers spent more on dining out
  - 54% of consumers spent more on gasoline
- **YUM Brands - Splits Up**
- **NPD / Crest Survey Finds Breakfast Visits on Increase During Last 12 Months**
- **Federal Judge Rules Against McDonald's in NLRB Document Request**
- **Seattle Pro-Labor Group Launch Hourly Wage Campaign - Citing \$15 is Not Enough**

**Brands: (see Company's pulse report for details)**

- **Chipotle:** Closes 42 locations in Washington & Oregon due to E. Coli breakout
- **Domino's:** Launches new delivery vehicle
- **McDonald's:** Launches All Day Breakfast
- **Wendy's:** Launches new version of Value Menu

**Same Store Sales (SSS):**

- Industry = 3.4%
- QSR = 4.0%
- Fast Casual = 4.8%
- Casual = 1.0%

Source for "Mean" on Charts on pages 9-29 - Company Filings.