

# Cablefax Daily™

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What the Industry Reads First

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## FCC Friday: Goodwill Tour?

Wet Washingtonians following Hurricane Joaquin's track didn't stop rumors about an FCC Wall Street "goodwill tour" from flying around. News of the tour first came from **Dealreporter**, which said its aim was to send the message that the Commission isn't hostile to the industries it regulates and clear up confusion around its merger review process. The tour was then later reported to have been canceled. FCC media relations dir *Shannon Gilson* said "there is no tour." In fact, a tour was never scheduled, we were told. The impetus for such a tour partly comes from a reportedly bad reception to FCC general counsel *Jon Sallet's* speech at the Telecom Policy Research conference on Sept 25. His remarks addressed the agency's process in its review of mergers, including the failed **Comcast-Time Warner Cable** transaction and the completed **AT&T-DirectTV** deal. The main concern with the Comcast deal came down to online video distribution, according to Sallet. At least one analyst's eyebrows were raised by his remarks. "After reading Sallet's comments from last Friday, there is clearly a path for the FCC to block **Charter-Time Warner Cable** (not to mention **Altice-Cablevision**), given that it does not increase competition. If you take Sallet's focus on adding to competition and the **DOJ's** 'bigger is badder' commentary, blocking the transaction would appear to be in the public interest," **BTIG's Rich Greenfield** wrote in a blog post last week. Still, Greenfield noted that Charter's deal-related commitments mitigate the potential harm to online video distributors and protect the open internet, providing the FCC a path to approve the deal without undermining the agency's views in prior transactions. The DOJ commentary he referenced stems from a speech by the agency's deputy assistant attorney general *Nancy Rose* in June at an **American Bar Association** event. Rose addressed potential harm and increased incentives to harm online video distribution as operators achieve bigger scale. As for tour talk, Sallet was in NYC Fri to speak at a **Fordham University** event on antitrust law and policy, which also features other regulators. He also was scheduled to attend a separate breakfast with investors while in town, but has canceled the plan. Republican commish *Ajit Pai* issued a statement on the so-called goodwill tour. "At first, I thought that this must have been a clever bit of satire. But apparently, it isn't," he said, declaring that the agency's problem right now isn't messaging. According to Pai, it's the Commission's "arbitrary and massive regulatory overreach over the past two years. With broadband providers' capital expenditures falling, widespread concerns about the design of the incentive auction, and an enforcement scheme unconstrained by the rule of

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law, the Commission shouldn't be focused on better marketing." What's needed are better policies that incentivize investment and deployment of broadband infrastructure and that "give entrepreneurs the certainty they need to innovate and succeed," said Pai. He also slammed the Commission's plan for the reported tour. While he agrees that the FCC's merger approach has been "opaque and incoherent," policy should be set straight in public by the 5 commish, not behind closed doors on Wall Street "for the benefit of a selected insiders," he said. Pai's chief of staff *Matthew Barry* also tweeted about the rumored tour: "Will FCC release publicly where it will be stopping on Wall Street 'goodwill' tour? Goldman Sachs? Morgan Stanley? Citigroup?"

**In the Courts:** At the beginning of the year, **Fox** and **DISH** paused litigation over the satellite provider's ad-skipping technology, saying they believed ongoing retransmission consent negotiations would likely result in resolution of the lawsuit. A stay was put in place until Oct 1. With no resolution or no retrans deal yet (the 2010 retrans pact expires by the end of the year), the case in District Court for Central CA is moving again. Both parties are to submit a proposed trial schedule by Fri. -- **Cablevision** and **Verizon** have settled their dispute over advertising, with the MSO describing the resolution as being to "both parties' satisfaction." Cablevision filed suit against Verizon in Jan, alleging false and misleading advertising around its "fastest WiFi" claims. Verizon returned serve, filing counterclaims over Cablevision's own wireless offerings.

**3Q Ratings:** Helped by the Aug GOP presidential debate, **Fox News** took the 3Q ratings primetime crown, averaging almost 2mln viewers for the quarter (June 29-Sept 27), according to **Nielsen** data. Fox News' Aug debate (25.1mln total viewers in L+7) was the most-watched program of the quarter, followed by **CNN's** Republican presidential debate on Sept 16 (23.7mln L+3). The debate was a boon for CNN, but it didn't help it make it into the 5 most-watched nets in total viewers for 3Q. **USA** (1.81mln), **TNT** (1.8mln), **Disney** (1.79mln) and **ESPN** (1.72mln) joined **Fox News** at the top. After the debates, the next most-watched programs were the 2nd half of ESPN's Monday Night Football season premiere double-header (14.5mln L+3) and the premiere of **AMC's** "Fear the Walking Dead" (14mln L+7). ESPN's NFL coverage and AMC's Fear each accounted for 3 of the 10 most-watched shows in 3Q. Also among the top 10 were Disney Channel original movie "Descendants" and Fox News' "The Kelly File." **Brag Book:** Disney was #1 among kids 6-11 in total day and prime (467K and 726K, respectively). It also was tops among kids 6-14 and 9-14. In kids 2-11, Disney was tops in prime (905K) followed by **Disney Junior** (353K). **Nick** had the edge in total day though, with 651K 6-11 viewers to Disney's 643K. **Investigation Discovery** had its best 3Q ever in prime, delivering more than 900K total viewers, and total day (607K). Sept was especially good for the net, with it hitting 929K in prime—a new record for the month. -- A heartfelt golf clap to **Golf Channel**, which posted its most-watched 3Q ever (114K viewers in total day, +8% from last year). The net's live telecasts of the **PGA Tour** in 3Q were up 17% vs last year.

**Technicolor's Exec Change:** **Technicolor** tapped *Luis Martinez Amago* as pres of its Connected Home division for the North American market. The company is acquiring **Cisco's** set-top unit for \$600mln. The unit will be part of the Connected Home division upon completion of the deal, expected by the end of the year. The exec was most recently CEO of **Alcatel-Lucent Shanghai Bell** joint venture.

**Amazon Bans Chromecast/Apple TV:** **Amazon** has informed its marketplace sellers that it will no longer sell **Google Chromecast** or **Apple TV** starting Oct 29. The move came as Google and Apple released new versions of their devices. The 2nd-generation Chromecast is available from the Google Store, while Apple TV is set to be on sale later this month. The reason behind the move? According to an Amazon statement, "over the last three years, Prime Video has become an important part of Prime. It's important that the streaming media players we sell interact well with Prime Video in order to avoid customer confusion. Roku, Xbox, PlayStation and Fire TV are excellent choices."

**Programming:** **Hallmark Movies & Mysteries** booked 4 additional "Signed, Sealed, Delivered" movies from producer *Martha Williamson* in 2016. The franchise will debut its next original movie, "Signed, Sealed, Delivered: The Impossible Dream" on Sun. -- **A&E** airs season 4 of scripted crime drama "Unforgettable" on Nov 13. -- With the ink dry on the **AT&T-DirecTV** merger, U-verse customers are now receiving **Audience Network**. Previously only available on DirecTV, the channel includes series such as "Kingdom" starring *Nick Jonas* and "Off Camera with Sam Jones." -- **A+E Nets** is combining The Critics' Choice Television Awards and The Critics' Choice Movie Awards into one 3-hour event. "The 21st Critics' Choice Awards" will air live on A&E, Lifetime and LMN, Jan 17 at 8pm, following a 1-hour red carpet show.

**Cablefax Week in Review**

Company	Ticker	10/x2 Close	1-Week % Chg	YTD %Chg
<b>BROADCASTERS/DBS/MMDS</b>				
DISH:	DISH	58.96	(0.35%)	(19.11%)
ENTRAVISION:	EVC	6.76	1.20%	4.32%
GRAY TELEVISION:	GTN	12.95	2.53%	15.63%
MEDIA GENERAL:	MEG	13.93	24.93%	(16.74%)
NEXSTAR:	NXST	47.07	5.73%	(9.11%)
SINCLAIR:	SBGI	26.24	3.80%	(4.09%)
TEGNA:	TGNA	23.09	1.27%	0.00%

Company	Ticker	10/x2 Close	1-Week % Chg	YTD %Chg
<b>MSOS</b>				
CABLE ONE:	CABO	431.00	0.97%	0.00%
CABLEVISION:	CVC	33.01	(0.27%)	59.93%
CHARTER:	CHTR	183.14	(0.21%)	9.91%
COMCAST:	CMCSA	58.72	3.82%	1.22%
COMCAST SPCL:	CMCSK	59.18	3.79%	2.80%
GCI:	GNCMA	16.38	(7.14%)	19.13%
LIBERTY BROADBAND:	LBRDA	54.12	0.24%	8.05%
LIBERTY GLOBAL:	LBTYA	44.29	(7.69%)	(11.79%)
SHAW COMM:	SJR	19.63	1.82%	(27.27%)
SHENTEL:	SHEN	41.28	(3.93%)	32.10%
TIME WARNER CABLE:	TWC	185.19	0.76%	21.79%

Company	Ticker	10/x2 Close	1-Week % Chg	YTD %Chg
<b>PROGRAMMING</b>				
21ST CENTURY FOX:	FOXA	28.04	8.98%	(27%)
AMC NETWORKS:	AMCX	74.64	0.48%	17.05%
CBS:	CBS	40.30	(1.15%)	(27.18%)
CROWN:	CRWN	5.26	2.33%	48.59%
DISCOVERY:	DISCA	26.09	(6.29%)	(24.27%)
DISNEY:	DIS	103.00	2.69%	9.35%
GRUPO TELEVISIA:	TV	26.05	(3.55%)	(23.52%)
HSN:	HSNI	57.44	(3.46%)	(24.42%)
LIONSGATE:	LGF	38.65	1.39%	20.71%
MSG:	MSG	171.50		
SCRIPPS INT:	SNI	49.80	0.44%	(33.84%)
STARZ:	STRZA	37.55	(3.35%)	26.43%
TIME WARNER:	TWX	70.59	4.01%	(17.36%)
VIACOM:	VIA	45.60	2.43%	(39.6%)
WWE:	WWE	17.30	0.93%	40.19%

Company	Ticker	10/x2 Close	1-Week % Chg	YTD %Chg
<b>TECHNOLOGY</b>				
ADVANTAGE:	AEY	2.24	(3.03%)	(8.2%)
AMDOCS:	DOX	56.81	(0.96%)	21.75%
AMPHENOL:	APH	50.51	(0.22%)	(6.13%)
APPLE:	AAPL	110.38	(3.78%)	0.00%
ARRIS GROUP:	ARRS	26.59	0.64%	(11.92%)
AVID TECH:	AVID	7.79	(3.83%)	(45.18%)
BLNDER TONGUE:	BDR	0.65	(4.41%)	(75.84%)
BROADCOM:	BRCM	51.20	(1.78%)	18.16%
CISCO:	CSCO	25.76	(1.04%)	(7.4%)
COMMSCOPE:	CTV	25.33	(2.5%)	(1.21%)
CONCURRENT:	CCUR	4.89	1.88%	(31.03%)
CONVERGYS:	CVG	23.36	2.50%	14.68%
CSG SYSTEMS:	CSGS	31.21	1.89%	24.49%
ECHOSTAR:	SATS	42.87	(0.42%)	(18.34%)
GOOGLE:	GOOG	626.91	2.44%	19.09%
HARMONIC:	HLIT	5.84	(0.85%)	(16.69%)
INTEL:	INTC	30.51	5.90%	(15.93%)
INTERACTIVE CORP:	IACI	67.58	1.02%	11.17%

Company	Ticker	10/02 Close	1-Week % Chg	YTD %Chg
LEVEL 3:	LVL	43.18	(0.8%)	(12.56%)
MICROSOFT:	MSFT	45.57	3.76%	(1.89%)
NETFLIX:	NFLX	106.11	3.84%	(68.94%)
NIELSEN:	NLSN	45.74	(2.16%)	2.26%
RENTRAK:	RENT	57.51	24.48%	(21.02%)
SEACHANGE:	SEAC	6.15	2.67%	(3.61%)
SEACHANGE:	SEAC	6.15	2.67%	(3.61%)
SONY:	SNE	25.76	1.66%	25.84%
SPRINT NEXTEL:	S	4.25	(1.16%)	2.41%
TIVO:	TIVO	8.87	0.23%	(25.08%)
UNIVERSAL ELEC:	UEIC	40.79	(8.17%)	(37.28%)
VONAGE:	VG	5.84	(3.47%)	53.28%
YAHOO:	YHOO	30.71	5.42%	(39.2%)

Company	Ticker	10/02 Close	1-Week % Chg	YTD %Chg
<b>TELCOS</b>				
AT&T:	T	32.64	0.96%	(2.83%)
CENTURYLINK:	CTL	24.65	(2.8%)	(37.72%)
FRONTIER:	FTR	4.88	(2.4%)	(23.75%)
TDS:	TDS	25.39	(1.09%)	0.55%
VERIZON:	VZ	42.84	(3.12%)	(8.42%)

Index	Value	1-Week % Chg	YTD %Chg	
<b>MARKET INDICES</b>				
DOW:	DJI	16472.37	0.97%	(7.58%)
NASDAQ:	IXIC	4707.78	0.45%	(0.6%)
S&P 500:	GSPC	1951.36	1.04%	(5.22%)

**WINNERS & LOSERS**

<b>THIS WEEK'S STOCK PRICE WINNERS</b>			
COMPANY	CLOSE	1-WK CH	
1. MEDIA GENERAL:	13.93	24.93%	
2. RENTRAK:	57.51	24.48%	
3. 21ST CENTURY FOX:	28.04	8.98%	
4. INTEL:	30.51	5.90%	

<b>THIS WEEK'S STOCK PRICE LOSERS</b>			
COMPANY	CLOSE	1-WK CH	
1. UNIVERSAL ELEC:	40.79	(8.17%)	
2. LIBERTY GLOBAL:	44.29	(7.69%)	
3. GCI:	16.38	(7.14%)	
4. DISCOVERY:	26.09	(6.29%)	
5. BLNDER TONGUE:	0.65	(4.41%)	

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