

# Exploration and Production Q2, 2014 Estimates



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As of 7/9/14

(in millions except for per share data)

Ticker	EPS Q4, 2013A	EPS Q1, 2014A	EPS Q2, 2014E <sup>(1)</sup>	Rev Q4, 2013A	Rev Q1, 2014A	Rev Q2, 2014E <sup>(1)</sup>	EBITDA Q4, 2013A	EBITDA Q1, 2014A	EBITDA Q2, 2014E <sup>(1)</sup>	CFPS Q4, 2013A	CFPS Q1, 2014A	CFPS Q2, 2014E <sup>(1)</sup>
AAV CN	-\$0.03	-\$0.45	\$0.15	\$60	\$60	\$96	\$40	\$45	\$62	\$0.34	\$0.34	\$0.26
APA	\$0.44	\$0.60	\$1.66	\$3,604	\$3,551	\$3,634	\$2,511	\$2,540	\$2,552	\$6.21	\$5.82	\$5.41
APC	-\$1.53	-\$5.30	\$1.27	\$3,977	\$4,248	\$4,074	\$1,988	\$2,506	\$2,658	\$4.17	\$3.43	\$4.37
AR	-\$0.85	-\$0.36	\$0.38	\$541	\$414	\$463	\$47	\$238	\$286	\$0.77	\$1.04	\$0.94
AREX	\$1.65	\$0.08	\$0.23	\$59	\$61	\$65	\$40	\$39	\$47	\$0.17	\$1.25	\$1.11
ATHL	\$0.27	\$0.23	\$0.27	\$91	\$106	\$119	\$67	\$79	\$91	\$0.57	\$0.57	\$0.81
AXAS	\$0.29	\$0.05	\$0.08	\$23	\$26	\$29	\$8	\$15	\$18	\$0.17	\$0.03	\$0.16
BBEP	-\$0.52	-\$0.08	\$0.18	\$195	\$185	\$219	\$99	\$84	\$122	\$0.80	\$0.98	\$0.78
BBG	-\$0.15	-\$0.27	\$0.03	\$141	\$118	\$131	\$75	\$66	\$81	\$1.45	\$1.57	\$1.37
BCEI	\$0.63	\$0.34	\$0.64	\$133	\$127	\$148	\$97	\$75	\$103	\$3.19	\$1.96	\$2.37
BIR CN	\$0.27	\$0.27	\$0.17	\$78	\$121	\$116	\$50	\$92	\$76	\$0.36	\$0.51	\$0.48
BNE CN	\$0.50	\$0.73	\$0.87	\$63	\$73	NC	\$44	\$44	NC	\$1.50	\$1.52	\$1.93
BNP CN	\$0.03	-\$0.22	\$0.24	\$215	\$272	\$284	\$131	\$188	\$151	\$0.58	\$0.83	\$0.69
BPZ	-\$0.09	-\$0.03	-\$0.02	\$12	\$21	\$26	-\$1	\$9	\$13	-\$0.14	-\$0.01	\$0.08
BTE CN	-\$0.82	\$0.38	\$0.59	\$154	\$311	\$431	\$28	\$167	\$217	\$1.43	\$0.97	\$1.50
CAK	-\$0.01	-\$0.01	NC	\$0	\$0	NC	-\$5	NC	NC	-\$0.01	\$0.00	NC
CEP	-\$0.43	-\$0.10	\$0.04	\$17	\$12	\$13	\$0	\$0	\$2	\$0.18	\$0.19	NC
CHK	-\$0.24	\$0.57	\$0.50	\$4,541	\$5,046	\$4,551	\$1,209	\$1,429	\$1,431	\$1.61	\$1.96	\$1.74
CLR	\$0.72	\$1.23	\$1.69	\$913	\$979	\$1,089	\$696	\$776	\$871	\$3.17	\$3.75	\$4.22
CNQ CN	\$0.38	\$0.57	\$0.91	\$3,947	\$4,471	\$5,205	\$1,900	\$2,151	\$2,823	\$2.01	\$1.24	\$2.36
CNX	\$3.22	\$0.51	\$0.26	\$776	\$965	\$924	\$144	\$307	\$263	\$0.30	\$1.46	\$0.93
COG	\$0.19	\$0.26	\$0.25	\$487	\$510	\$518	\$333	\$344	\$373	\$0.62	\$0.61	\$0.77
COS CN	\$0.40	\$0.35	\$0.27	\$1,048	\$1,056	\$804	\$469	\$444	\$324	\$0.96	-\$0.25	\$0.53
CPE	\$0.03	\$0.00	\$0.13	\$27	\$32	\$38	\$16	\$15	\$26	\$0.47	\$0.50	\$0.57
CPG CN	-\$0.03	\$0.08	\$0.40	\$810	\$848	\$828	\$622	\$633	\$642	\$1.29	\$1.45	\$1.47
CQE CN	\$0.00	\$0.00	\$0.02	\$20	\$42	\$43	\$9	\$17	\$22	\$0.04	\$0.04	\$0.10
CR CN	-\$0.48	-\$1.07	\$0.03	\$90	\$95	\$122	\$52	\$57	\$61	\$0.40	\$0.41	\$0.41
CRK	-\$0.81	\$0.02	\$0.10	\$106	\$142	\$148	\$57	\$109	\$114	\$1.21	\$2.05	\$2.12
CRZO	-\$0.56	\$0.13	\$0.68	\$132	\$151	\$171	\$91	\$102	\$134	\$1.33	\$2.28	\$2.63
CWEI	\$0.53	\$0.94	\$1.44	\$114	\$123	\$123	\$68	\$73	\$84	\$5.02	\$6.52	\$5.88
CXO	\$1.01	\$0.87	\$0.95	\$637	\$646	\$669	\$392	\$444	\$478	\$4.02	\$4.58	\$3.88
DNR	\$0.25	\$0.17	\$0.27	\$596	\$607	\$633	\$305	\$325	\$348	\$0.96	\$0.61	\$0.83
DUNR	-\$0.17	-\$0.03	NC	\$12	\$12	NC	\$4	\$3	NC	-\$0.04	-\$0.04	NC
DVN	\$0.51	\$0.80	\$1.40	\$2,624	\$3,725	\$3,887	\$1,322	\$1,466	\$1,844	\$3.54	\$3.50	\$4.11
ECA	-\$0.34	\$0.16	\$0.26	\$1,423	\$1,892	\$1,562	\$442	\$934	\$794	\$0.62	\$1.27	\$0.85
EGN	\$1.16	\$0.73	\$0.54	\$473	\$561	\$357	\$246	\$242	\$212	\$2.75	\$4.09	\$2.68
EGY	\$0.46	-\$0.12	\$0.28	\$58	\$28	NC	\$42	\$4	NC	\$0.67	-\$0.41	\$0.44
END	-\$0.60	-\$0.91	-\$0.33	\$117	\$94	\$77	\$79	\$62	\$57	\$0.06	\$0.56	\$0.47
EOG	\$1.07	\$1.22	\$1.34	\$3,698	\$4,194	\$4,216	\$1,844	\$2,141	\$2,330	\$3.69	\$4.18	\$3.87
EOX	-\$0.17	-\$0.02	\$0.04	\$17	\$19	\$26	-\$2	-\$3	\$14	-\$0.05	-\$0.05	\$0.19
EPM	-\$0.02	\$0.02	\$0.05	\$4	\$4	\$4	\$2	\$2	\$3	\$0.04	\$0.09	\$0.30
EQT	\$0.76	\$1.27	\$0.82	\$493	\$662	\$603	\$345	\$509	\$398	\$1.28	\$3.05	\$2.45
ERF CN	-\$0.16	\$0.20	\$0.34	\$381	\$375	\$478	\$370	\$224	\$231	\$1.74	\$0.69	\$1.08
ESCR	-\$0.64	-\$0.45	NC	\$10	\$12	NC	NC	\$3	NC	NC	\$0.24	NC
EXXI	\$0.10	\$0.06	\$0.22	\$291	\$285	\$316	\$173	\$171	\$190	\$2.08	\$2.62	\$1.77
FANG	\$0.43	\$0.49	\$0.65	\$76	\$98	\$121	\$61	\$79	\$97	\$1.36	\$1.48	\$1.72
FST	\$0.91	-\$0.18	-\$0.02	\$93	\$60	\$67	\$58	\$32	\$41	\$0.15	\$0.08	\$0.21
FXEN	\$0.07	-\$0.02	-\$0.02	\$9	\$10	\$9	\$0	\$2	NC	-\$0.01	\$0.08	\$0.03
GDP	-\$0.73	-\$0.68	-\$0.43	\$50	\$49	\$55	\$24	\$24	\$35	\$0.72	\$0.15	\$0.45
GMET	-\$0.11	-\$0.01	NC	\$8	NC	NC	\$1	NC	NC	\$0.03	\$0.03	NC
GPOR	\$0.30	\$0.97	\$0.19	\$68	\$118	\$126	\$41	\$82	\$90	\$0.61	\$1.83	\$1.11
GTE	-\$0.04	\$0.16	\$0.15	\$159	\$169	\$173	\$102	\$125	\$124	\$0.61	\$0.13	\$0.35
HES	\$5.76	\$1.21	\$1.15	\$5,183	\$5,554	\$2,381	\$696	\$1,539	\$1,534	\$4.64	\$3.64	\$4.12
HK	-\$1.01	-\$0.19	\$0.04	\$289	\$268	\$301	\$180	\$168	\$192	\$0.25	\$0.39	\$0.32
HNR	-\$3.02	-\$0.19	\$0.07	\$0	\$0	NC	-\$21	-\$43	\$0	-\$0.18	-\$0.17	\$0.02
KOG	\$0.17	\$0.11	\$0.18	\$265	\$257	\$283	\$193	\$187	\$211	\$0.63	\$0.61	\$0.68
KWK	-\$0.18	-\$0.34	-\$0.07	\$114	\$92	\$115	\$32	\$3	\$40	\$0.17	-\$0.12	\$0.01
LEG CN	-\$0.05	\$0.02	\$0.08	\$117	\$143	\$153	\$75	\$98	\$83	\$0.45	\$0.41	\$0.49
LGCY	-\$0.82	\$0.01	\$0.33	\$122	\$122	\$127	\$65	\$64	\$71	\$0.68	\$1.05	\$1.06
LINE	-\$3.14	-\$0.27	\$0.41	\$526	\$734	\$955	\$248	\$327	\$577	\$0.90	\$1.32	\$1.34
LPI	\$0.48	\$0.00	\$0.17	\$153	\$173	\$188	\$103	\$111	\$127	\$0.63	\$0.91	\$0.71
MCF	NC	\$0.33	\$0.65	NC	\$67	\$79	NC	\$46	\$64	NC	\$1.74	\$3.01
MHR	-\$0.36	-\$0.44	-\$0.16	\$25	\$105	\$103	-\$5	\$16	\$40	\$0.19	\$0.02	\$0.11
MUR	\$0.41	\$0.86	\$1.22	\$1,348	\$1,281	\$1,406	\$632	\$750	\$910	\$5.18	\$4.06	\$4.41
NBL	\$0.38	\$0.56	\$0.77	\$1,272	\$1,294	\$1,399	\$713	\$841	\$998	\$2.18	\$2.58	\$2.38
NFG	\$0.98	\$1.14	\$0.75	\$550	\$756	\$468	\$254	\$270	\$227	\$2.11	\$3.89	\$2.35
NFX	\$0.13	\$2.09	\$0.45	\$515	\$514	\$535	\$404	\$358	\$341	\$2.57	\$2.68	\$2.14
NOG	\$0.28	\$0.11	\$0.23	\$96	\$90	\$100	\$71	\$65	\$72	\$0.88	\$1.19	\$0.99
NVA CN	-\$0.40	-\$0.03	\$0.02	\$50	\$59	NC	\$19	\$28	NC	\$0.24	\$0.19	\$0.20
OAS	\$0.58	\$1.71	\$0.73	\$331	\$347	\$365	\$221	\$235	\$256	\$1.71	\$2.09	\$2.16
OXY	\$2.04	\$1.75	\$1.77	\$6,172	\$6,088	\$5,842	\$4,188	\$3,510	\$3,732	\$3.92	\$3.41	\$3.88
PDCE	\$0.37	-\$0.06	\$0.36	\$144	\$157	\$144	\$80	\$85	\$80	\$1.11	\$2.26	\$1.94

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PEY CN	\$0.26	\$0.41	\$0.41	\$154	\$191	\$217	\$125	\$160	\$164	\$0.78	\$0.96	\$1.05
PHX	\$0.59	\$0.68	NC	\$19	\$21	NC	\$13	\$15	NC	\$1.44	\$1.20	NC
POU CN	\$0.00	-\$0.09	-\$0.13	\$55	\$81	\$68	\$8	\$33	\$30	-\$0.07	\$0.41	\$0.22
PQ	\$0.04	\$0.15	\$0.14	\$53	\$60	\$63	\$34	\$39	\$43	\$0.42	\$0.71	\$0.54
PVA	-\$0.06	\$0.27	-\$0.03	\$114	\$133	\$150	\$80	\$87	\$111	\$0.56	\$1.01	\$1.12
PXD	-\$9.82	\$0.85	\$1.24	\$996	\$1,039	\$963	\$397	\$581	\$605	\$3.88	\$3.26	\$3.78
QEP	-\$0.29	\$0.22	\$0.31	\$716	\$884	\$871	\$342	\$427	\$411	\$1.19	\$1.79	\$1.91
REN	-\$1.60	-\$0.05	\$0.01	\$92	\$86	\$92	\$46	\$38	\$44	\$0.05	\$0.85	\$0.48
REXX	-\$0.27	\$0.17	\$0.16	\$74	\$92	\$88	\$36	\$47	\$48	\$0.05	\$0.30	\$0.69
ROSE	\$0.48	\$0.57	\$0.82	\$181	\$215	\$254	\$98	\$145	\$179	\$1.98	\$2.46	\$2.60
RRC	\$0.17	\$0.20	\$0.43	\$425	\$500	\$509	\$201	\$278	\$313	\$1.50	\$1.13	\$1.59
SARA	-\$0.56	-\$0.27	\$0.07	\$13	\$12	NC	\$5	\$4	NC	\$0.04	\$0.13	NC
SD	\$0.01	-\$0.29	\$0.03	\$465	\$443	\$397	\$235	\$264	\$227	\$0.57	\$0.19	\$0.28
SFY	-\$0.96	\$0.12	\$0.03	\$146	\$144	\$138	\$94	\$92	\$89	\$1.98	\$1.60	\$1.57
SGY	\$0.04	\$0.52	\$0.37	\$239	\$224	\$222	\$145	\$132	\$133	\$3.17	\$2.36	\$2.39
SM	\$0.10	\$0.98	\$1.58	\$608	\$604	\$616	\$375	\$377	\$400	\$5.04	\$4.47	\$5.39
SN	\$0.19	-\$0.31	\$0.27	\$130	\$135	\$144	\$97	\$89	\$105	\$1.81	\$1.37	\$1.64
SOG CN	-\$0.04	-\$0.04	\$0.01	\$12	\$13	\$26	\$0	\$0	\$8	\$0.00	\$0.00	\$0.02
SWN	\$0.41	\$0.55	\$0.59	\$907	\$1,113	\$989	\$533	\$661	\$581	\$1.51	\$1.73	\$1.59
SYRG	\$0.02	\$0.08	\$0.14	\$15	\$19	\$39	\$11	\$12	\$30	\$0.06	\$0.20	\$0.39
TLM CN	-\$0.98	\$0.47	\$0.06	\$1,269	\$1,335	\$1,428	\$649	\$784	\$706	\$0.43	\$0.46	\$0.57
TPLM	\$0.12	\$0.22	\$0.15	\$50	\$89	\$118	\$24	\$36	\$53	\$0.41	-\$0.20	\$0.48
UNT	\$1.06	\$1.17	\$1.13	\$359	\$388	\$396	\$174	\$194	\$183	\$3.59	\$2.55	\$3.54
UPL	\$0.27	\$0.66	\$0.59	\$225	\$317	\$287	\$146	\$226	\$194	\$0.95	\$1.15	\$1.06
USEG	-\$0.04	\$0.01	\$0.11	\$10	\$8	\$11	\$4	\$4	\$6	\$0.24	\$0.24	\$0.21
VET CN	\$0.99	\$1.00	\$0.94	\$307	\$357	\$355	\$215	\$253	\$277	\$1.74	\$1.74	\$1.97
WLL	-\$0.50	\$0.92	\$1.17	\$702	\$721	\$774	\$180	\$468	\$545	\$4.13	\$2.72	\$4.16
WPX	-\$4.85	\$0.09	-\$0.08	\$657	\$1,014	\$816	-\$274	\$301	\$227	\$0.59	\$1.02	\$0.96
WRES	\$0.05	\$0.11	\$0.12	\$33	\$34	\$36	\$19	\$20	NC	\$0.29	\$0.21	\$0.28
WTI	-\$0.16	\$0.15	\$0.12	\$243	\$250	\$253	\$140	\$163	\$153	\$1.14	\$1.57	\$1.75
XCO	-\$0.57	-\$0.02	\$0.04	\$180	\$198	\$180	\$103	\$129	\$110	\$0.59	\$0.77	\$0.30
XEC	\$2.37	\$1.59	\$1.66	\$517	\$599	\$645	\$498	\$410	\$437	\$4.40	\$4.00	\$4.89
<b>Median</b>	<b>\$0.03</b>	<b>\$0.14</b>	<b>\$0.26</b>	<b>\$153</b>	<b>\$169</b>	<b>\$220</b>	<b>\$95</b>	<b>\$106</b>	<b>\$151</b>	<b>\$0.78</b>	<b>\$1.03</b>	<b>\$1.06</b>

(1) Bloomberg Best estimate. Companies with no reported Bloomberg Best estimate are marked "NC."

Source: Bloomberg; compiled by EnerCom, Inc for Oil & Gas 360™.

# OilService Q2, 2014 Estimates



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As of 7/9/14

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Ticker	EPS Q4, 2013A	EPS Q1, 2014A	EPS Q2, 2014E <sup>(1)</sup>	Rev Q4, 2013A	Rev Q1, 2014A	Rev Q2, 2014E <sup>(1)</sup>	EBITDA Q4, 2013A	EBITDA Q1, 2014A	EBITDA Q2, 2014E <sup>(1)</sup>	CFPS Q4, 2013A	CFPS Q1, 2014A	CFPS Q2, 2014E <sup>(1)</sup>
AETI	\$0.07	\$0.06	\$0.08	\$18	\$17	NC	\$1	\$0	NC	\$0.10	\$0.10	NC
ATW	\$1.30	\$1.14	\$1.07	\$285	\$273	\$280	\$135	\$112	\$128	\$2.50	\$0.13	\$1.65
BAS	-\$0.18	-\$0.05	\$0.09	\$308	\$337	\$354	\$59	\$65	\$77	\$1.45	\$0.70	\$1.42
BHI	\$0.56	\$0.75	\$0.90	\$5,860	\$5,731	\$5,857	\$918	\$989	\$1,102	\$2.27	\$0.69	\$1.86
BOLT	\$0.35	\$0.28	NC	\$22	\$16	NC	\$7	\$4	NC	-\$0.06	\$0.32	NC
BRS	\$0.52	\$0.84	\$1.10	\$412	\$441	\$452	\$65	\$72	\$86	\$0.13	\$2.63	NC
CAM	\$0.96	\$0.51	\$0.87	\$2,938	\$2,432	\$2,557	\$445	\$338	\$368	\$2.73	-\$0.81	\$1.29
CBI	\$1.83	\$0.83	\$1.27	\$3,000	\$2,928	\$3,292	\$272	\$212	\$282	\$0.75	-\$1.35	\$1.60
CFW CN	\$0.13	\$0.10	-\$0.15	\$463	\$548	\$394	\$57	\$64	\$31	-\$0.14	\$0.21	\$0.14
CJES	\$0.14	\$0.22	\$0.25	\$265	\$317	\$333	\$37	\$43	\$50	\$0.34	\$0.96	\$0.68
CKH	\$0.42	\$0.57	NC	\$328	\$310	\$321	\$60	\$53	NC	\$2.51	\$3.09	NC
CLB	\$1.42	\$1.36	\$1.34	\$276	\$263	\$270	\$95	\$89	\$91	\$1.92	\$1.46	\$1.53
CRR	\$0.90	\$0.80	\$0.97	\$165	\$149	\$165	\$43	\$39	\$45	\$2.89	\$1.92	\$1.41
DO	\$0.67	\$1.05	\$0.60	\$726	\$709	\$689	\$283	\$293	\$237	\$1.50	\$2.19	\$1.51
DRQ	\$1.15	\$1.05	\$1.15	\$232	\$204	\$230	\$71	\$66	\$71	\$0.52	\$1.19	\$1.34
DVR	-\$0.01	-\$0.14	-\$0.05	\$160	\$119	\$127	\$14	-\$2	\$11	\$0.12	-\$0.42	\$0.06
DWSN	-\$0.36	\$0.20	\$0.29	\$68	\$77	\$77	\$5	\$13	\$14	-\$2.73	\$2.93	\$1.70
ESI CN	\$0.18	\$0.40	\$0.14	\$536	\$624	\$492	\$117	\$161	\$99	\$0.75	\$0.51	\$0.58
ESV	\$1.55	\$1.25	\$1.32	\$1,256	\$1,187	\$1,221	\$602	\$545	\$565	\$2.37	\$1.80	\$2.01
FES	-\$0.18	-\$0.07	-\$0.06	\$110	\$110	\$114	\$18	\$18	\$20	\$0.25	\$0.25	NC
FLR	\$1.03	\$0.93	\$0.99	\$6,292	\$5,385	\$5,971	\$316	\$323	\$311	\$0.44	\$1.17	\$1.71
FTI	\$0.75	\$0.57	\$0.63	\$2,048	\$1,824	\$1,915	NC	\$267	\$291	\$1.55	\$0.22	\$0.86
FTK	\$0.21	\$0.22	\$0.23	\$101	\$103	\$108	\$21	\$23	\$23	\$0.34	\$0.29	\$0.27
FWLT	-\$0.38	\$0.17	\$0.48	\$851	\$734	\$970	\$15	\$46	\$78	\$0.79	-\$0.44	\$0.66
GEOS	\$1.86	\$0.83	\$0.36	\$101	\$69	\$44	\$39	\$21	NC	\$4.07	\$0.24	\$0.71
GIFI	-\$0.22	\$0.24	\$0.24	\$135	\$135	\$107	\$2	\$12	\$12	\$1.67	\$1.66	\$0.65
GLF	\$0.97	\$0.63	\$0.97	\$125	\$120	\$133	\$53	\$42	\$55	\$2.62	\$0.67	\$1.70
HAL	\$0.93	\$0.73	\$0.91	\$7,639	\$7,348	\$7,862	\$1,641	\$1,480	\$1,713	\$2.24	\$1.12	\$1.48
HERO	-\$0.63	\$0.12	\$0.02	\$235	\$257	\$243	\$110	\$98	\$72	\$0.02	\$0.25	\$0.27
HLX	\$0.35	\$0.51	\$0.42	\$227	\$254	\$265	\$81	\$80	\$90	\$0.52	\$0.46	\$0.79
HOS	\$0.62	\$0.33	\$0.50	\$145	\$137	\$150	\$67	\$54	\$65	\$1.09	\$1.04	\$1.39
HP	\$1.61	\$1.61	\$1.63	\$889	\$893	\$942	\$379	\$375	\$400	\$2.85	\$2.18	\$2.82
IESC	\$0.01	\$0.02	NC	\$120	\$120	NC	\$1	\$1	NC	-\$0.12	\$0.27	NC
IO	\$0.12	\$0.46	\$0.01	\$219	\$145	\$125	\$104	\$44	\$37	\$0.42	\$0.38	NC
KBR	\$0.19	-\$0.29	\$0.27	\$1,754	\$1,633	\$1,686	\$65	-\$3	\$91	\$1.41	-\$0.12	\$0.49
KEG	-\$0.08	-\$0.08	\$0.00	\$362	\$356	\$373	\$54	\$45	\$70	\$0.47	\$0.30	\$0.36
KEX	\$1.13	\$1.09	\$1.29	\$568	\$589	\$610	\$153	\$150	\$165	\$2.66	\$2.04	\$1.77
LAYN	-\$1.41	-\$1.41	-\$0.48	\$191	\$191	\$216	-\$6	-\$6	\$7	-\$0.65	-\$0.65	\$0.37
LII CN	\$0.11	\$0.09	\$0.11	\$46	\$44	\$48	\$10	\$6	\$11	\$0.39	\$0.38	\$0.23
MDR	-\$1.37	-\$0.21	-\$0.17	\$517	\$604	\$647	-\$183	-\$12	\$14	-\$0.37	-\$0.09	-\$0.09
NBR	\$0.50	\$0.17	\$0.23	\$1,607	\$1,590	\$1,593	\$440	\$394	\$414	\$1.50	\$1.50	\$1.23
NE	\$0.68	\$0.99	\$0.67	\$1,167	\$1,251	\$1,186	\$544	\$628	\$532	\$1.43	\$1.99	\$1.77
NES	-\$0.53	-\$0.46	-\$0.22	\$128	\$128	\$145	\$4	\$16	\$28	-\$0.25	\$0.12	NC
NOV	\$1.54	\$1.38	\$1.44	\$6,172	\$5,777	\$5,547	\$1,157	\$1,056	\$1,114	\$3.55	\$1.14	\$1.92
NR	\$0.16	\$0.41	\$0.14	\$263	\$243	\$246	\$38	\$31	\$32	\$0.66	\$0.04	\$0.25
OII	\$0.86	\$0.84	\$1.01	\$895	\$840	\$916	\$188	\$186	\$217	\$1.51	\$0.76	\$1.46
OIS	\$1.35	\$1.33	\$0.99	\$675	\$658	\$592	\$205	\$184	\$149	\$1.88	\$1.98	\$1.59
PD CN	\$0.24	\$0.35	\$0.00	\$567	\$672	\$459	\$198	\$237	\$125	\$0.34	\$0.58	\$0.51
PES	-\$0.04	-\$0.04	\$0.06	\$238	\$239	\$254	\$56	\$61	\$66	\$1.03	\$0.66	\$0.80
PKD	\$0.08	-\$0.10	\$0.10	\$243	\$229	\$246	\$64	\$54	\$68	\$0.30	\$0.26	\$0.53
POWL	\$0.69	\$1.30	\$0.88	\$172	\$162	\$191	\$14	\$13	\$19	\$0.45	-\$1.01	NC
PSD CN	-\$0.04	-\$0.03	\$0.00	\$5	\$6	\$6	NC	-\$4	\$5	NC	\$0.02	NC
PTEN	\$0.12	\$0.24	\$0.32	\$659	\$678	\$708	\$214	\$204	\$226	\$1.63	\$1.26	\$1.33
PWR	\$0.77	\$0.25	\$0.42	\$1,818	\$1,763	\$1,799	\$195	\$136	\$181	\$0.93	-\$0.28	\$0.57
RDC	\$0.40	\$0.48	\$0.24	\$393	\$378	\$417	\$130	\$127	\$137	\$1.85	\$0.65	\$0.85
RES	\$0.18	\$0.18	\$0.27	\$487	\$502	\$545	\$123	\$124	\$152	\$0.29	\$0.36	\$0.48
RIG	\$0.64	\$1.25	\$1.13	\$2,332	\$2,339	\$2,275	\$731	\$1,009	\$910	\$2.14	\$0.98	\$1.70
SDY CN	\$0.06	\$0.11	\$0.05	\$48	\$52	\$50	\$11	\$8	\$10	\$0.50	\$0.49	\$0.22
SES CN	\$0.10	\$0.20	\$0.04	\$388	\$526	\$434	\$40	\$55	\$31	\$0.17	\$0.05	\$0.20
SLB	\$1.26	\$1.22	\$1.36	\$11,906	\$11,239	\$11,941	\$3,137	\$3,036	\$3,373	\$2.94	\$1.25	\$2.03
SLCA	\$0.31	\$0.34	\$0.45	\$149	\$180	\$190	\$32	\$38	\$47	\$0.34	\$0.57	\$0.66

## OilService Q2, 2014 Estimates



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As of 7/9/14

(in millions except for per share data)

Ticker	EPS Q4, 2013A	EPS Q1, 2014A	EPS Q2, 2014E <sup>(1)</sup>	Rev Q4, 2013A	Rev Q1, 2014A	Rev Q2, 2014E <sup>(1)</sup>	EBITDA Q4, 2013A	EBITDA Q1, 2014A	EBITDA Q2, 2014E <sup>(1)</sup>	CFPS Q4, 2013A	CFPS Q1, 2014A	CFPS Q2, 2014E <sup>(1)</sup>
SPM IM	\$0.72	\$0.14	\$0.16	\$3,548	\$2,943	\$3,204	\$587	\$311	\$338	\$0.52	-\$1.38	\$0.56
SPN	-\$1.97	\$0.23	\$0.41	\$1,128	\$1,061	\$1,145	\$225	\$257	\$292	\$1.61	\$1.31	\$1.44
SVY CN	\$0.05	\$0.21	-\$0.07	\$177	\$238	\$135	\$32	\$35	\$14	\$0.36	\$0.29	\$0.10
TCW CN	-\$0.14	-\$0.06	-\$0.33	\$552	\$643	\$441	\$35	\$45	-\$5	\$0.05	-\$0.23	\$0.03
TDG CN	\$0.23	\$0.19	\$0.03	\$225	\$252	\$177	\$83	\$74	\$43	\$1.17	\$0.14	\$0.22
TDW	\$0.25	\$0.88	\$0.94	\$365	\$368	\$382	\$112	\$102	\$112	\$1.22	\$0.70	\$1.86
TESO	\$0.14	\$0.08	\$0.28	\$137	\$121	\$144	\$22	\$10	\$28	\$1.05	\$1.04	\$0.45
TGE	-\$0.21	\$0.19	-\$0.13	\$19	\$49	NC	-\$1	\$12	NC	-\$0.04	\$0.14	NC
THR	\$0.40	\$0.30	\$0.25	\$71	\$67	\$66	\$21	\$18	\$15	\$0.62	\$0.30	\$0.30
TTI	-\$0.13	-\$0.09	\$0.19	\$225	\$213	\$249	\$7	\$14	\$50	\$0.07	\$0.46	\$0.51
VK FP	\$0.70	\$0.40	\$0.56	\$1,609	\$1,271	\$1,389	\$259	\$196	\$239	\$2.76	\$0.80	\$1.29
VTG	\$0.10	\$0.08	\$0.05	\$239	\$232	\$215	\$130	\$123	\$112	\$0.06	\$0.16	\$0.15
WFT	-\$0.35	-\$0.05	\$0.21	\$3,738	\$3,596	\$3,768	\$313	\$551	\$731	\$0.86	-\$0.52	\$0.67
WG	\$0.27	-\$0.14	\$0.18	\$541	\$518	\$536	\$48	\$19	\$29	\$1.44	\$1.18	\$0.30
XDC CN	-\$0.09	\$0.04	\$0.07	\$63	\$70	\$65	\$19	\$14	\$19	\$0.08	\$0.07	NC
<b>Median</b>	<b>\$0.24</b>	<b>\$0.25</b>	<b>\$0.27</b>	<b>\$318</b>	<b>\$327</b>	<b>\$377</b>	<b>\$65</b>	<b>\$62</b>	<b>\$78</b>	<b>\$0.75</b>	<b>\$0.42</b>	<b>\$0.75</b>

(1) Bloomberg Best estimate. Companies with no reported Bloomberg Best estimate are marked "NC."

Source: Bloomberg; compiled by EnerCom, Inc for Oil & Gas 360™.