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# **Cincinnati Model Investment Club (CinMIC)**

# Agenda for Sat. Aug 18, 2018 / 9:45 – 11:45AM Room C

**View our portfolio at ManifestInvesting.com:** [**https://** **www.manifestinvesting.com/clubs/630/dashboards/39194**](https://www.manifestinvesting.com/clubs/630/dashboards)

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| **9:45 Call to Order:**  | Rich Alden, Presiding Partner, greeting, attendance, proxies, note guests present and on web. RECORD |
| **9:50 Minutes**  | Minutes for Jul 21, 2017 Meeting - posted to BIVIO Aug 11, 2018. Corrections or additions? |
| **9:55 Financial Report** | Current financial report, current cash balance $1,312.46. Limit orders? |
| **10:00 Announcements** | Classes and webinars: see BetterInvesting Magazine ONLINE section opposite CONTENTS. Other investing educational sessions: Register on the BI web site for “Ticker Talk” and Stock-Up”. “The Roundtable” and “Turn Out Tuesday” occurs each month sponsored by BI Mid-Michigan Chapter. Register with both by contacting: nkavula1@comcast.net.2019 BINC will be in Chicago |
| **10:05 Old Business** | Partnership Amendment Committee update - Dene |
| **10:15 New Business** | New member update? Marty/DeneNew stock study and education schedule, below |
| **10:20 Stock Study** | Kate: presentation on ULTA; Sep: CraigPlease note the list of pre-screened stocks below for ideas. |
| **10:40 Education** | Jackie: “$0 Investing” low barriers to entry; Sep: Mary |
| **11:00 Portfolio Analysis** | Marty: review and discuss “Close of the Bell” Portfolio. Sell/Buy recommendations and discussions. |
| **11:30 Buy/Hold/ Sell** | Reports need to be done approximately ONE week before Saturday meeting, discuss Buy/Hold/Sell |

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| **Stock** | **Symbol** | **Watcher** | **Watcher: Buy/Hold/Sell** | **SSG: Buy/Hold/Sell** | **# of Shares** | **% of Portfolio** | **Year End** |
| Apogee | APOG | Nelson | Buy (small) | Buy | 185 | 6.0 | Dec |
| Apple  | AAPL | Jackie | Hold | Hold | 95 | 13.1 | Sep. |
| C. H. Robinson  | CHRW | Dene | Hold | Hold | 150 | 9.4 | Dec |
| CBRE Group | CBRE | Mary | Buy | Buy | 10 | 0.3 |  |
| Cerner  | CERN | Gregory | Hold/Sell | Buy | 70 | 3.0 | Dec |
| Cognizant | CTSH | Michele | Hold | Buy | 200 | 10.0 | Dec |
| CVS Health | CVS | Dene | Buy 5sh | Buy | 145 | 6.6 | Dec |
| Danaher | DHR | Harrison | Hold | Hold | 110 | 7.3 | Dec |
| Fastenal | FAST | Rich | Hold | Buy | 200 | 7.6 | Dec |
| LKQ Corp  | LKQ | Frank | Buy 50-75sh | Buy | 375 | 8.4 | Dec |
| Schlumberger | SLB | Mary | Hold | Hold | 140 | 6.1 | Dec |
| Signature Bank | SBNY | Craig | Hold | Hold | 110 | 8.1 | Dec |
| Starbucks | SBUX | Gerry | Replace | Buy | 160 | 5.5 | Sep |
| Tractor Supply | TSCO | Kate | Hold | Hold | 145 | 7.7 | Dec |
| Pounce/Watch List |

**Future meetings: Mid-Month Portfolio/Stock Committee: Sep 1, webinar; Regular meeting: Sep 15, Board Room**

**Sep: Education: Mary; Stock Study: Craig; new members may alter this schedule**



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| Company Name | Ticker |
| Air Lease | AL 5/4/18 |
| ~~Argan~~ | ~~AGX~~ |
| B of Ozarks | OZRK |
| Cambrex | CBM |
| Cantel Medical | CMD 5/4/18 |
| ~~CBRE Group~~ | ~~CBRE~~ |
| Essent Group | ESNT |
| Facebook | FB |
| First Foundation | FFWM |
| Fleetcor Technologies | FLT 5/4/18 |
| Heico Corp | HEI 5/4/18 |
| IPG Photonics | IPGP |
| Lam Research | LRCX 5/4/18 |
| O'Rielly | ORLY |
| ~~Silicom~~ | ~~SILC~~ |
| Skyworks Solutions | SWKS |
| Ulta Beauty | ULTA |
| ~~Ulta Beauty~~ | ~~ULTA~~ |
| Western Alliance Banc | WAL |