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

# Agenda for Sat. Dec 15, 2018 / 9:45 – 11:45AM

**Midpointe Library, Room C**

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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 Nov 17, 2018 Meeting – circulated Nov 17, 2018. Corrections or additions? |
| **9:55 Financial Report** | Current financial report, current cash balance $8,831.14. 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, O’Hare MarriottBI OKI Chapter Spring Educational Event: Mar 30, 2019, LaQuinta |
| **10:05 Old Business** | Vote for 2019 officers: Rich-Presiding, Jackie-VP and Education, Betsy-Financial, Kate-Recording |
| **10:10 New Business** | Stock study and education schedule, below |
| **10:15 Stock Study** | Nelson: Walt Disney CompanyPlease note this list of pre-screened stocks for ideas: [List of Pre-screened Stocks](https://www.manifestinvesting.com/dashboards/public/74KV7LF) |
| **10:35 Education** | Rich: Uniform stock watcher reports |
| **10:50 Portfolio Review** | See table below. CinMIC portfolio is now public on Manifest Investing: [CinMIC Portfolio](https://www.manifestinvesting.com/dashboards/public/RDHP243) |
| **11:10 Review & Reflection** | Balancing the portfolio in turbulent times,  |
| **11:30 Buy/Hold/ Sell** | Reports need to be done approximately ONE week before Saturday meeting, discuss Buy/Hold/Sell |
| **Stock** | **Symbol** | **Watcher** | **Watcher: Buy/Hold/Sell** | **SSG: Buy/Hold/Sell** | **# of Shares** | **% of Portfolio** | **Year End** |
| Apple  | AAPL | Jackie | HOLD | BUY | 95 | 11.3 | Sep. |
| C. H. Robinson  | CHRW | Cheryl |  |  | 150 | 8.9 | Dec |
| CBRE Group | CBRE | Mary | HOLD | HOLD | 55 | 2.2 | Dec |
| Cognizant | CTSH | Michele | HOLD | BUY | 200 | 9.6 | Dec |
| CVS Health | CVS | Dene | HOLD | HOLD | 145 | 7.4 | Dec |
| Danaher | DHR | Harrison | HOLD | HOLD | 110 | 7.9 | Dec |
| Fastenal | FAST | Rich | HOLD | HOLD | 200 | 7.6 | Dec |
| LKQ Corp  | LKQ | Frank | HOLD | BUY | 400 | 7.0 | Dec |
| Schlumberger | SLB | Mary | HOLD | HOLD | 140 | 4.0 | Dec |
| Signature Bank | SBNY | Craig | HOLD | BUY | 110 | 8.5 | Dec |
| Starbucks | SBUX | Gerry | HOLD | BUY | 160 | 7.5 | Sep |
| Tractor Supply | TSCO | Greg | HOLD | HOLD | 145 | 9.3 | Dec |
| Ulta Beauty | ULTA | Kate | HOLD | HOLD | 15 | 2.6 | Jan |
| **Pounce/Watch List** |
| **Stock** | **Symbol** | **Watcher** | **Presented** | **Recommendation/Remarks** |
| Celgene | CELG | Gregg | Jul, 2018 |  |
| Fleetcor Technologies | FLT | Michele | May, 2018 |  |
| LCI Industries | LCII | Cheryl | Oct, 2018 |  |
| Cantel Medical | CMD | Dene | Nov, 2018 | SSG is BUY but total return is low, drop from list? |

**Future meetings: Mid-Month Portfolio/Stock Committee: Jan 5, webinar; Regular meeting: Jan 19, Library, Board Room**

**Stock Study: Jackie – TBD; Education: Gerry – TBD; new members may alter this schedule**

Suggested procedure from Michele to share SSGs with CinMIC partners:

*From an open study select: File/Share Study/Copy of Online Study. Next add or select your own email address in the Select Recipients window. Next, select ‘Share Study’. (selecting the checkbox ‘Send me a copy of the message to yourself will not work unless a selected recipient has been chosen). Once you receive it, you can be forward it to* *cinmic@bivio.com* *without a hitch. You could also copy and paste the SSG hyperlink into another email of choice if you prefer.*



Stocks to study (subject to change without notice):

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| Company Name | Ticker |
| Air Lease | AL |
| Booking Holdings | BKNG |
| BlackRock | BLK |
| Cambrex | CBM |
| Celgene | CELG |
| Comcast | CMCSA |
| Carriage Services | CSV |
| Walt Disney | DIS |
| Essent Group | ESNT |
| Gentex | GNTX |
| Heico Corp | HEI |
| IPG Photonics | IPGP |
| Lam Research | LRCX |
| O'Reilly | ORLY |
| B of Ozarks | OZK |
| Charles Schwab | SCHW |
| Sensata | ST |
| Skyworks Solutions | SWKS |
| T Rowe Price | TROW |
| Western Alliance Banc | WAL |