**MicNOVA Jun 2022 Meeting Agenda**

| **Meeting Location** | Online via Go-To Meeting |
| --- | --- |
| **Meeting Date & Time** | Jun 14 2022 07:00 PM - 09:00 PM |
| **Online Information** | https://global.gotomeeting.com/join/251997157  You can also dial in using your phone.  United States: +1 (312) 757-3121  Access Code: 251-997-157 |

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**Agenda**

| 07:00 - 07:05 PM | Welcome Partners, Regular Guests and First Time Visitors  Disclosure: Better Investing | Baskar |
| --- | --- | --- |
| 07:05 - 07:07 PM | Secretary’s Minutes.  *2 Corrections:*  *(Add LGIH report from May)*  *CBOE Vs Maskey*  *Janet: Stock watcher for MSFT, GNRC* | Maskey |
| 07:07 - 07:10 PM | Treasurer’s report  Bought: 9 Shares of EPAM @ $300/share  Bought: 12 shares of GNRC @$212/share | Gladys/Pat |
| 07:10 - 07:35 PM | Education: Different Classes of Share | Pat |
| 07:35 - 08:00 PM | New Stock Presentation: Houlihan LoKey (HLI) | Jo |
| 08:00 - 08:30 PM | Stock Watchers ( Please share the Online SSG with all MicNOVA members)  Portfolio:  AAPL (Paul)  AX (Sheryl)  ESNT (Ty)  MNST (Amy)  NVEE (Sheryl) | Paul  Sheryl  Ty  Amy |
| 08:30 - 08:45 PM | Decision: Buys and Sells  *(SELL(?): LGIH, AX)*  *(BUY(?): ADBE or GOOG)* | Partners |
| 08:45 - 08:55 PM | Upcoming Events and Announcements | Baskar |
| 09:00 | Adjourn | Baskar |

**Next Month (Jul 12 2022) Reminders**

| Education | TBD | Arvind |
| --- | --- | --- |
| New Stock Presentation | TBD | Pat |
| Portfolio Reports |  |  |
| Watchlist Reports |  |  |
| Other Topic | Alternative Structure for MicNOVA | Sheryl, Baskar, Kevin Gillogly |

**2022 BI and Community Events & Announcements**

| Sat Jun 18 10:30AM - 01:00 PM | DC Chapter Annual Meeting Online: Speaker: Mike Canet  “Entrance & Exit Strategies: Tax efficiencies pre and post retirement”  Business meeting to follow after this speech.  Chapter Special Events Please join my meeting from your computer, tablet or smartphone.<https://meet.goto.com/114623005>  You can also dial in using your phone.  (For supported devices, tap a one-touch number below to join instantly.)  United States: +1 (646) 749-3122  - One-touch: tel:+16467493122,,114623005#  Access Code: 114-623-005 |
| --- | --- |
| Jun 23-26 2022 | BINC is Jun 23-26 at the Westin Dallas Park Central |
| Mon Jul 11 2022 07:00 - 08:15 PM | Digging into BI Magazine  Registration URL: <https://register.gotowebinar.com/rt/6574788583850753036>  Webinar ID:729-893-259 |
| Wed Jul 20 07:00 - 09:00 PM | MCMC Monthly Meeting  https://global.gotomeeting.com/join/745127301  You can also dial in using your phone.  (For supported devices, tap a one-touch number below to join instantly.)  United States: +1 (872) 240-3311  - One-touch: tel:+18722403311,,745127301#  Access Code: 745-127-301 |
| Sat Jul 16 09:30 - 02:00 PM | DC Chapter Annual Meeting. In person at Bethesda, MD  Online via GTM. More details to come. |

**Schedule: New Stock Presentation, Planning and Monthly Meeting Chair**

|  | **Name** | **Education** | **New Stock Presentation** | **Conduct MicNOVA Monthly Meeting** | **Conduct MicNOVA Planning Meeting** |
| --- | --- | --- | --- | --- | --- |
| 1 | Patterson, Sheryl | 5/9/23 | 2/14/2023 | 12/13/2022 | 12/6/2022 |
| 2 | Hughes, James (Ty)\* | 1/10/23 | 04/12/2022 | 10/11/2022 | 10/4/2022 |
| 3 | Krishnarao, Maskey | 2/14/23 | 12/13/2022 | 5/9/23 | 5/2/2023 |
| 4 | Krishna, Arvind | 7/12/22 | 10/11/2022 | 8/9/2022 | 8/4/2022 |
| 5 | Arumugam, Baskar | 9/13/22 | 1/10/2023 | 6/14/2022 | 6/7/2022 |
| 6 | Henrikson, Gladys | 10/11/22 | 09/13/2022 | 1/10/2023 | 1/3/2023 |
| 7 | Murphy, Josephine(Jo)\* | 8/9/22 | 6/14/2022 | 7/12/2022 | 7/5/2022 |
| 8 | Emmons, Elinor(Kathy) | 4/11/23 | 3/14/2023 | 9/13/2022 | 9/8/2022 |
| 9 | Laing, Amy | 12/31/22 | 11/8/2022 | 3/14/23 | 3/7/23 |
| 10 | Onufrak, Patricia | 6/14/22 | 7/12/2022 | 2/14/2023 | 2/7/2023 |
| 11 | O’Mara, W. Paul | 11/8/22 | 8/9/2022 | 11/8/2022 | 11/1/2022 |
| 12 | Lewis, Janet | 3/14/23 | 5/9/23 | 4/11/2023 | 4/4/2023 |

**Schedule: Education Topics**

| **Title** | **Presenter** |
| --- | --- |
| Portfolio Harvesting | Jo Murphy |
| Ratios using Price | Sheryl/Gladys |
| Judgements/TBD(Apr 2022) | Kathy Emmons |
| Banking Terms used in preparing an SSG for Bank | Maskey Krishnarao |
| Analysts Consensus using Sheryl’s Spreadsheet | Amy Laing |
| Generating Reports with Bivio | Ty Hughes |
|  |  |

Previous Suggestions for Education Topic:

* How to navigate and use Yahoo Finance as a source for stock ideas and analysis.
* Alternative approaches to constructing & managing a portfolio: style, industry; performance to S&P 500
* Introducing Detailed Estimates in SSG Plus (1 of 2) ; Add Analyst Estimates to Your SSGs : Ticker Talk July 2020
* "Research and Your SSG", 2nd of 2 "Adding Judgement" programs (Stock-up Sept 10 2020- Ken Kavula/Ann Cuneaz). Get tips for what to
* look for in Value Line, Morningstar, CFRA, Company reports and more.
* New Tools/Capabilities in the SSG.
* Addressing anomalies in Stock & Market performance
* Putting together Powerpoint Presentation (For new stock presentation) - What should the presentation answer?, snipping tool, Strawman outline - maybe a Sat morning
* Understanding /Applying various financial terms: "Book Value," "Cash Flow," Current Ratio, Quick Ratio, Peg Ratio
* Stock Screening BI Weekly Emails
* Cryptocurrency Trading Online (Amy)
* Penny Stocks (Amy)