**MicNOVA Oct 2023 Meeting Agenda**

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| **Meeting Location** | Online via Go-To Meeting |
| **Meeting Date & Time** | Oct 10 2023 07:00 PM - 09:00 PM |
| **Online Meeting** | 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**

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| 07:00 - 07:05 PM | Welcome Partners, Regular Guests and First Time Visitors  Introduce Andrew Ober  Disclaimer: Better Investing | Ty |
| 07:05 - 07:07 PM | Secretary’s Minutes | Arvind/Maskey |
| 07:07 - 07:15 PM | Treasurer’s Report | Gladys/Ty |
| 07:15 - 07:35 PM | **Education**: Using the BI Stock Screener to Find Great Stocks in Targeted Industries | Gladys |
| 07:35 - 07:55 PM | **New Stock Presentation**: Cummins, Inc. (Ticker: CMI) | Patrick |
| 07:55 - 08:20 PM | Stock Watchers  *(Please share the Online SSG with all MicNOVA members)*  Portfolio:   * AAPL (Paul) * FND (Pat) * MNST (Gladys) * NVEE (Maskey) | Paul  Pat  Gladys  Maskey |
| 08:20 - 08:30 PM | Portfolio Review | Ty |
| 08:30 - 08:45 PM | Decision: Buys and Sells | Partners |
| 08:45 - 08:55 PM | Upcoming Events and Announcements | Ty |
| 09:00 | Adjourn | Ty |

**2023 BI and Community Events & Announcements**

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| Tue Oct 17 2023 12:00 - 01:00 PM EST | Fidelity Presentation for **MicNOVA** - by  Parker Willis  *Financial Consultant*  703-893-1008 ext. 52022  Zoom   |  | | --- | | [https://fmr.zoom.us/j/98221323914?pwd=ZzZ1Y3hEMGFwbzVFU2pLT09BYVd2QT09](https://fmr.zoom.us/j/98221323914?pwd=ZzZ1Y3hEMGFwbzVFU2pLT09BYVd2QT09" \t "_blank) | |
| Tue Oct 17 2023 07:30 - 09:00 PM  (Third Tuesdays of Month) | Money Matters Book Discussion. **Book: The Long View: Revisiting The Four Pillars of Investing** by William Bernstein  Online via GTM: You can also dial in using your phone.  United States: +1(646) 749-3122  One-touch: tel:+16467493122,,804623085#  Access Code: 804-623-085 |
| Wed Oct 18 07:00 - 09:00 PM  Wed Nov 15 07:00 - 09:00 PM  (3nd Wednesdays of Month) | 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 |
| Mon Oct. 23 08:30 PM | Volunteer Resources  Online Volunteer Training – 4 BITS  (Recruiting New Members)  <https://www.betterinvesting.org/volunteer-resources/home> |
| Thursday, Oct 26, 2023  8:00 PM - 9:30 PM Eastern | Deep Dive Series: Discounted Cash Flow (DCF) DCF Series: Part 1 Online Only.  Register Online at BetterInvesting Events Page |
| Thursday, Nov 2, 2023  8:00 PM - 9:30 PM Eastern | Deep Dive Series: Discounted Cash Flow (DCF) DCF Series: Part 2 Online Only.  Register Online at BetterInvesting Events Page |
| Sat Oct 28 09:30 - 03:30 PM | SSG Class Part 1 - Online Only. |
| Sat Nov 4 09:30 - 03:30 PM | SSG Class Part 2 - Online Only |
| Fri Nov 3 08:00 - 09:00 PM | DC Chapter Director Meeting |
| Mon Nov 6 07:00 - 08:15 PM | Digging into BI Magazine  Registration URL: <https://register.gotowebinar.com/rt/6574788583850753036>  Webinar ID:729-893-259 |
| Tue Nov 14 07:00 - 09:00 PM  (2nd Tuesdays of Month) | MicNOVA Monthly Meeting Online  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 |
| Oct 18 - 22 2023 (different days and times) | San Francisco Chapter - 3 Fall Seminars. Please go to San Francisco Chapter Events on BI Website to register   * “Using Better Investing Online Tool to make me a better investor” * “VISA - Is this a stock for you” * “3 tools to enhance investing skills” |
| Beginning Sep 2023 - Every 2nd Sat 09:30 AM - 11:45 AM | “Learn to Earn - Series” each month. Florida Chapter presents. |

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

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|  | **Name** | **Education** | **New Stock Presentation** | **Conduct MicNOVA Monthly Meeting** | **Conduct MicNOVA Planning Meeting** |
| **1** | Patterson, Sheryl | 5/14/24 | 2/13/24 | 12/12/23 | 12/5/23 |
| 2 | Hughes, James (Ty)\* | 1/9/24 | 04/9/24 | 10/8/24 | 10/1/24 |
| 3 | Krishnarao, Maskey | 2/13/24 | 12/12/23 | 5/14/24 | 5/7/24 |
| 4 | Krishna, Arvind | 7/9/29 | 11/14/23 | 8/13/24 | 8/6/24 |
| 5 | Arumugam, Baskar | 9/10/24 | 1/9/24 | 6/11/24 | 6/4/24 |
| 6 | Henrikson, Gladys | 10/8/24 | 7/9/24 | 1/9/24 | 1/2/24 |
| 7 | Murphy, Josephine (Jo) | 8/13/24 | 6/11/24 | 7/9/24 | 7/2/24 |
| 8 | Emmons, Elinor(Kathy) | 4/9/24 | 3/12/24 | 9/10/24 | 9/3/24 |
| 9 | Smith, Patrick | 12/12/23 | 10/8/24 | 3/12/24 | 3/5/24 |
| 10 | Onufrak, Patricia | 6/11/24 | 8/13/24 | 2/13/24 | 2/6/24 |
| 11 | O’Mara, W. Paul | 11/14/23 | 09/10/24 | 11/14/23 | 11/7/23 |
| 12 | Lewis, Janet | 3/12/24 | 5/14/24 | 4/9/24 | 4/2/24 |

**Stock Watcher Reports**

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| **MicNOVA Portfolio Updated with closing prices as of 09/30/23** | | | | | | | | | |
| **Ticker** | **Stock Watcher** | **Bought Price** | **Date Bought** | **Closing Prices As of 9/30/23** | **% of portfolio** | **Shares** | **Earnings Date** | **Quarter** | **Stock Watcher Reports Due** |
| ADBE | Kathy | 484.5 | 1/20/21 | 509.9 | 15.40% | 23 | 18-Sep-23 | Q3 | May, Aug, Dec, Feb |
| GOOGL | Jo | 922.57 | 12/16/16 | 131.85 | 8.30% | 117 | 27-Oct-23 | Q3 | May, Aug, Dec, Feb |
| AAPL | Paul | 12.57 | 6/21/11 | 171.21 | 1.40% | 73 | 3-Aug-23 | Q3 | Feb, May, Nov, Feb |
| CLFD | Ty | 62.92 | 2/15/23 | 28.66 | 4.00% | 52 | 3-Aug-23 | Q3 | May, Aug, Nov, Feb |
| FND | Pat | 81.35 | 9/14/22 | 90.5 | 12.40% | 100 | 7-Aug-23 | Q1 | May, Aug, Dec, Feb |
| GNRC | Janet | 212.48 | 5/11/22 | 108.96 | 9.20% | 32 | 7-Aug-23 | Q2 | May, Aug, Nov, Feb |
| GNTX | Ty | 14.81 | 6/19/14 | 32.54 | 4.30% | 190 | 20-Oct-23 | Q3 | May, Aug, Nov, Feb |
| MSFT | Janet | 25.44 | 9/17/09 | 315.75 | 1.70% | 43 | 27-Oct-23 | Q1 | Nov, Feb May, Aug |
| MNST | Gladys | 59.8 | 3/13/20 | 52.95 | 7.10% | 140 | 7-Aug-23 | Q2 | May, Aug, Dec, Feb |
| NVE5 | Maskey | 53.84 | 1/10/20 | 96.23 | 3.30% | 40 | 9-Aug-23 | Q2 | Apr, Jun, Sep, Dec |
| PYPL | Baskar | 62.591 | 8/9/23 | 58.46 | 5.40% | 56 | 6-Nov-23 | Q3 | May, Aug, Dec, Feb |
| SSD | Ty | 95.61 | 12/14/22 | 149.81 | 5.90% | 40 | 28-Jul-23 | Q2 | May, Aug, Dec, Feb |
| TSCO | Paul | 185 | 9/23/22 | 203.05 | 5.70% | 20 | 24-Jul-23 | Q1 | May, Aug, Dec, Feb |
| V | Patrick | 63.52 | 9/18/14 | 230.01 | 2.90% | 30 | 27-Oct-23 | Q4 | Feb, May, Aug, Nov |
| VRTX | Arvind | 207.26 | 4/21/21 | 347.74 | 7.30% | 23 | 7-Jul-23 | Q2 | May, Aug, Nov, Feb |
| WAL | Sheryl | 59.225 | 12/15/22 | 45.97 | 7.30% | 159 | 24-Jul-23 | Q2 | May, Aug, Dec, Feb |

**Next 3 Months - Reminders**

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| Nov 2023 | Education |  | **Paul** |
| Nov 2023 | New Stock | ASML Holding (ASML) | **Arvind** |
| Dec 2023 | Education |  | **Patrick** |
| Dec 2023 | New Stock |  | **Maskey** |
| Jan 2024 | Education |  | **Ty** |
| Jan 2024 | New Stock |  | **Baskar** |