# **­**

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

# Agenda for Sat. May 19, 2018 / 9:45 – 11:45AM Room C

**Midpointe Library--9363 Centre Pointe Drive, West Chester, OH 45069**

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

|  |  |
| --- | --- |
| **9:45 Call to Order:**  | Dene Alden, Acting Presiding Partner, greeting, proxies (Dene for Kate and Rich) (Mary for Jackie), note guests present and on web. RECORD |
| **9:50 Minutes**  | Minutes for Apr 28, 2017 Meeting - posted to BIVIO Apr 29, 2018. Corrections or additions?Volunteer for Recording Partner. |
| **9:55 Financial Report** | Current financial report, limit orders, $2,025.06 to invest. Latisha’s account to be determined. Floor opens to members to purchase shares of her partnership. |
| **10:00 Announcements** | Classes and webinars: see BetterInvesting Magazine or ONLINE section opposite CONTENTS. Other investing educational sessions: “The Roundtable” and “Turn Out Tuesday” once each month sponsored by BI Mid-Michigan. Register with both by contacting: nkavula1@comcast.net.BINC this weekend. 2019 goes on sale first week after BINC. Location? |
| **10:05 Old Business** | Volunteer to help coordinate side dishes (appetizers, side, salad, desserts).June Picnic at the Jacobsen’s, 9440 Meadow Trail, Loveland OH 45140, 513-505-3708Please RSVP to Craig with number of guests. |
| **10:10 New Business** | News: Marty Eckerle to receive National Recognition at BINC - The Kenfield-Burris Online Service Award for Contributions to BI Online Investment Education.OKI Chapter Board of BetterInvesting.org Planning Meeting on Weds. June 20th, 6-9PM, sandwiches will be served. Open to all. Please bring comments, suggestions and input for the coming year. |
| **10:25 Education** | Craig: Review of “Selling In Your Portfolio” from Ken/Mark class on April 21. Discussion. |
| **10:45 Stock Study** | Michele: FleetCor Technologies (FLT)? |
| **11:10 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 |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Stock** | **Symbol** | **Watcher** | **Watcher: Buy/Hold/Sell** | **SSG: Buy/Hold/Sell** | **# of Shares** | **% of Portfolio** | **Year End** |
| Apogee | APOG | Nelson | BUY | BUY | 175 | 5.1 | Dec |
| Apple  | AAPL | Jackie | HOLD | HOLD | 95 | 12.5 | Sep. |
| C. H. Robinson  | CHRW | Dene | HOLD | HOLD | 150 | 9.0 | Dec |
| Cerner  | CERN | Gregory | HOLD | BUY | 70 | 3.0 | Dec |
| Cognizant | CTSH | Michele | HOLD | BUY | 200 | 10.7 | Dec |
| CVS Health | CVS | Dene | BUY | BUY | 130 | 5.8 | Dec |
| Danaher | DHR | Harrison | HOLD | HOLD | 110 | 7.8 | Dec |
| Fastenal | FAST | Rich | HOLD | BUY | 200 | 7.2 | Dec |
| LKQ Corp  | LKQ | Frank | ? | BUY | 375 | 7.9 | Dec |
| Schlumberger | SLB | Mary | HOLD | HOLD | 140 | 6.9 | Dec |
| Signature Bank | SBNY | Craig | HOLD | HOLD | 110 | 10.0 | Dec |
| Starbucks | SBUX | Gerry |  |  | 145 | 5.8 | Sep |
| Tractor Supply | TSCO | Kate | HOLD | HOLD | 145 | 7.0 | Dec |
| Pounce/Watch List |

**Future meetings: Mid-Month Portfolio/Stock Committee: Jun 2, webinar;**

**Regular meeting: Jun 16 at the Jacobsen residence, 9440 Meadow Trail, Loveland, OH 45140**

**Juu Education: Dene; Stock Study: Mary**