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

# Agenda for Sat. Mar 16, 2019 / 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 Feb 16, 2019 Meeting – posted to bivio on Mar 10, 2019. Corrections or additions? | | | | | | |
| **9:55 Financial Report** | Current financial report, current cash balance $3,302.95. Limit order for 10 sh of LRCX @$170 was triggered Mar 6. Tax filing update | | | | | | |
| **10:00 Announcements** | - BI OKI Chapter Spring Educational Event: Mar 30, 2019, LaQuinta Sharonville  - Financial Literacy Month presentation Apr 23, MidPointe Library, 7-8p, Jackie Koski “What are These Mutual Funds in My Investment Account?” Details can be found [here](http://midpointelibrary.evanced.info/signup/EventDetails?EventId=15968&backTo=Calendar&startDate=2019/04/01).  - BINC will be at the Chicago Marriott O’Hare, May 16-19, 2019  - 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](mailto:nkavula1@comcast.net). | | | | | | |
| **10:05 Old Business** | None | | | | | | |
| **10:10 New Business** | - 2019 Stock study and education schedule, below.  - Mid-month meeting results: Michele presented Lowes (LOW), Harrison presented Home Depot (HD) in preparation for a Starbucks (SBUX) challenge  - May 18 meeting: no rooms available, meet another Sat or meet Lane Library, several members to be absent. Move meeting to Sat, May 25? | | | | | | |
| **10:15 Stock Study/Education** | Michele: Lowes (LOW), Harrison: Home Depot (HD)  Please note this list of pre-screened stocks for ideas: [Stocks to Study](https://www.manifestinvesting.com/dashboards/public/74KV7LF) | | | | | | |
| **10:35 Education** | SCG and discussion of HD, LOW, SBUX, LKQ, TSCO | | | | | | |
| **10:50 Portfolio Review** | - See table below. CinMIC portfolio is now public on Manifest Investing: [CinMIC Portfolio](https://www.manifestinvesting.com/dashboards/public/RDHP243) ;  [Pounce List Companies.](https://www.manifestinvesting.com/dashboards/public/PF79C2D) | | | | | | |
| **11:10 Review & Reflection** | TBD, no topics at this time. | | | | | | |
| **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 | HOLD | 95 | 11.1 | Sep. |
| C. H. Robinson | CHRW | Cheryl | BUY 10sh | BUY | 150 | 8.6 | Dec |
| CBRE Group | CBRE | Mary | HOLD | BUY | 125 | 4.0 | Dec |
| Cognizant | CTSH | Michele | HOLD | BUY | 200 | 9.3 | Dec |
| CVS Health | CVS | Dene | BUY 20sh | BUY | 155 | 5.5 | Dec |
| Danaher | DHR | Harrison | HOLD | HOLD | 110 | 9.1 | Dec |
| Fastenal | FAST | Rich | HOLD | HOLD | 200 | 8.0 | Dec |
| LKQ Corp | LKQ | Frank | HOLD | BUY | 400 | 7.2 | Dec |
| Lam Research | LRCX | Bill | HOLD | BUY | 10 | 1.1 | Jun |
| Schlumberger | SLB | Mary | HOLD | BUY | 140 | 3.8 | Dec |
| Signature Bank | SBNY | Craig | HOLD | BUY | 110 | 9.6 | Dec |
| Starbucks | SBUX | Gerry | (optimism) | BUY | 160 | 7.2 | Sep |
| Tractor Supply | TSCO | Greg | HOLD | HOLD | 145 | 8.5 | Dec |
| Ulta Beauty | ULTA | Kate | HOLD | HOLD | 15 | 3.0 | Jan |
| Vanguard Healthcare ETF | VHT | --- (Jackie) |  |  | 20 | 2.2 | --- |
| **Pounce/Watch List** | | | | | | | |
| **Stock** | **Symbol** | **Watcher** | **Presented** | **Recommendation/Remarks** | | | |
| Fleetcor Technologies | FLT | Phillip | May, 2018 |  | | | |
|  |  |  |  |  | | | |

**Future meetings: Mid-Month Portfolio/Stock Committee: Apr 6, webinar; Regular meeting: Apr 20, Library, Room C**

**Stock Study: Rich - TBD; Education: Dene – TBD; new members may alter this schedule**

