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

# Agenda for Sat. May 15, 2021 / 9:45 – 11:45AM

**Online Only**

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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 April 17, 2021 meeting posted to bivio on Apr 18, 2021. Corrections or additions? |
| **…. Financial Report** | - Current financial report, cash balance: $4,958.62 as of CoB May 7, 2021 |
| **…. Announcements** | - Better Investing Weekly Newsletter – First Cuts, webinars, Learning Center, news and information- 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 “Bull Sessions” occurs each month sponsored by BI Mid-Michigan Chapter. Register with both by contacting: nkavula1@comcast.net - BINC is moving from May to October 21-24, still in Dallas- “Taste of BINC” – May 20,2021, presented by StockUp, registration required <https://www.betterinvesting.org/learn-about-investing/our-events/taste-of-binc>  |
| **…. Resources** | - CinMIC portfolios on Manifest Investing: [CinMIC Portfolio](https://www.manifestinvesting.com/dashboards/public/KJQJDP7), Pounce List: [Pounce List Companies](https://www.manifestinvesting.com/dashboards/public/PF79C2D)- Pre-screened stocks: Use Manifest Investing screen with rank> 98% and/or CinMIC Stocks to Study List: [Stocks to Study](https://www.manifestinvesting.com/dashboards/public/74KV7LF) |
| **10:00 Old Business** | - Presentation schedule updated, see below |
| **…. New Business** | - Gerry Geverdt situation |
| **10:10 Stock Study** | - Harrison: Thermo Fisher (TMO) |
| **10:35 Education** | - Craig: Continued discussion of selling criteria/process |
| **11:00 Portfolio Review** | - Marty’s analysis of the CinMIC portfolio; members to address their PERT misses |
| **11:15 Review and Reflection** | - Ken Kavula’s recommendations on reviewing SSGs – a way to expand our portfolio? |
| **11:30 Buy/Hold/ Sell** | - Reports need to be done approximately ONE week before Saturday meeting |
| **Stock** | **Symbol** | **Watcher** | **Watcher: Buy/Hold/Sell** | **SSG: Buy/Hold/Sell** | **# of Shares** | **% of Portfolio** | **Year End** |
| Adobe | ADBE | Kate (1) | HOLD | HOLD | 20 | 4.9 | Nov |
| Alphabet | GOOG | Nelson (2) | BUY 1sh | BUY | 3 | 3.5 | Dec |
| Apple  | AAPL | Jackie | BUY 10sh | BUY | 150 | 9.6 | Sep |
| C. H. Robinson  | CHRW | Michele (2) | HOLD | HOLD | 93 | 4.7 | Dec |
| CACI International | CACI | Craig | BUY 10sh | BUY | 35 | 4.6 | Jun |
| Charles Schwab | SCHW | Nelson (2) | HOLD | HOLD | 360 | 13.3 | Dec |
| Danaher | DHR | Harrison (2) | BUY | HOLD | 90 | 11.5 | Dec |
| Fastenal | FAST | Rich (1) | HOLD | HOLD | 400 | 10.9 | Dec |
| Fidelity Select Healthcare | FSPHX | --- |  |  | 278.7640 | 4.4 | --- |
| IRobot | IRBT | Bill | BUY 10sh | BUY | 95 | 4.6 | Dec |
| Illumina | ILMN | Dene (1) | HOLD | HOLD | 15 | 2.9 | Dec |
| Ollie’s Bargain Barn | OLLI | Michele (2) | BUY 10sh | BUY | 140 | 5.7 | Dec |
| Starbucks | SBUX | Harrison (2) | HOLD | HOLD | 80 | 4.5 | Sep |
| Tractor Supply | TSCO | ~~Gerry~~ Paul | HOLD | HOLD | 130 | 12.3 | Dec |

**Future meetings: Mid-Month Portfolio/Stock Committee: June 5, 2021, online; Regular meeting: June 19, 2021, online**

**Note: The Stock Study and Education schedule is in the process of revision**

