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

# Agenda for Sat. October 16, 2021 / 10:30a – 12:30p

**Online and In-person at MidPointe Library Board Room**

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| **10:30 Call to Order:** | Rich Alden, Presiding Partner, greeting, attendance. Welcome to all our guests, especially those attending for the first time. There is a handout available in the control panel tab that will introduce CinMIC’s purpose to our newcomers, and act as a reminder to our repeat visitors. Disclaimer: Securities are for illustrative purposes only. Investors should conduct their own review and analysis of any company of interest before making an investment decision. |
| **10:35 Minutes** | - Minutes for September 18, 2021 meeting posted to bivio on September 25, 2021. Corrections or additions? Motion/second to accept |
| **…. Financial Report** | - Current financial report, cash balance: $3,197.47 as of CoB October 8, 2021; ($2.75) for investment after Nelson’s $3,200.22 payout  - Dene’s transfer of units |
| **…. Announcements** | - Jackie’s withdrawal |
| **10:45 Old Business** | - Guests are encouraged to join CinMIC |
| **…. New Business** | - New disclaimer statement for presentations  - 1:1 ratio of stocks to watchers by Feb 28, 2022 or earlier |
| **11:00 Stock Study** | - Bill: “Survivor, CinMIC Edition” |
| **11:25 Education** | - Marty: Understanding Stock Charts, Part 2 |
| **11:50 Portfolio Review** | - CinMIC portfolio review; members to address their PERT misses |
| **12:05 Review and Reflection** | - Steering Committee – participation, duties, responsibilities?  - Adjustments to the stock study/education segments  - Craig – portfolio goals and report card |
| **12:15 Buy/Hold/ Sell** | - Reports need to be done approximately ONE week before Saturday meeting |
| **12:30 Close** | - Future Meetings: Mid-Month Meeting: November 6, 2021, online; Regular Meeting: November 20, 2021, hybrid |

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| **Stock** | **Symbol** | **Watcher** | **Watcher: Buy/Hold/Sell** | **SSG: Buy/Hold/Sell** | **# of Shares** | **% of Portfolio** | **Year End** |
| Adobe | ADBE | Kate (1) | HOLD | HOLD | 20 |  | Nov |
| Alphabet | GOOG | Roger | HOLD | HOLD | 4 |  | Dec |
| Apple | AAPL | Jackie | HOLD | HOLD | 135 |  | Sep |
| C. H. Robinson | CHRW | Michele (2) | BUY 10sh | HOLD | 103 |  | Dec |
| CACI International | CACI | Craig (2) | HOLD | BUY | 40 |  | Jun |
| Danaher | DHR | Harrison (2) | HOLD | HOLD | 80 |  | Dec |
| Fastenal | FAST | Rich (1) | HOLD | HOLD | 300 |  | Dec |
| Fidelity Sel. Healthcare | FSPHX | --- |  |  | 338.5150 |  | --- |
| IRobot | IRBT | Bill | BUY 10sh | BUY | 125 |  | Dec |
| Illumina | ILMN | Dene (1) | HOLD | HOLD | 15 |  | Dec |
| Malibu Boats | MBUU | Craig (2) | BUY 30sh | BUY | 30 |  | Jum |
| Ollie’s Bargain Barn | OLLI | Michele (2) | HOLD | BUY | 160 |  | Dec |
| Starbucks | SBUX | Harrison (2) | HOLD | HOLD | 80 |  | Sep |
| Tractor Supply | TSCO | Paul | HOLD | HOLD | 120 |  | Dec |

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| **…. Resources** | - CinMIC Portfolio: <https://www.manifestinvesting.com/dashboards/public/cinmic>  - CinMIC Core Stocks: <https://www.manifestinvesting.com/dashboards/public/cinmic-core>  - CinMIC Non-Core Stocks: <https://www.manifestinvesting.com/dashboards/public/non-core>  - CinMIC Stocks to Study: <https://www.manifestinvesting.com/dashboards/public/cinmic-stocks-to-study>  - Or get them all in one place with this link: [Manifest Investing](https://www.manifestinvesting.com/clubs/630/dashboards).  - Mid-Michigan Chapter presentation on portfolio management: <https://www.youtube.com/watch?v=Z58tL-1g7cc>  - 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](mailto:nkavula1@comcast.net)  - 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](mailto:nkavula1@comcast.net) |
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**Note: The Stock Study and Education schedule is in the process of revision**

