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

# Agenda for Sat. November 20, 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 October 16, 2021 meeting posted to bivio on October 20, 2021. Corrections or additions? Motion/second to accept |
| **…. Financial Report** | - Current financial report, cash balance: $11,550.02 as of CoB November 12, 2021; $2,550.02 for investment after Jackie’s pending $9,000 withdrawal. |
| **…. BI/OKI Announcements** | - |
| **10:45 Old Business** | - Guests are encouraged to join CinMIC |
| **…. New Business** | - Committee to nominate officers for 2022 – nominating chair plus one?  - Audit payments and report to Financial Partner  - Financial Partner bond? - $572/yr, motion/second/vote  - Annual rotation of stock followers  - Preparation for December 11 holiday meeting |
| **11:00 Stock Study** | - Jackie: “Survivor, CinMIC Edition”, Part 2 |
| **11:25 Education** | - Rich: “Trimming Your Portfolio’s Sails” |
| **11:50 Portfolio Review** | - CinMIC portfolio review; members to address their PERT misses |
| **12:05 Review and Reflection** | - Craig: CACI Review and Recommendation |
| **12:15 Buy/Hold/ Sell** | - Reports need to be done approximately ONE week before Saturday meeting |
| **12:30 Close** | - Future Meetings: Mid-Month Meeting: December 4, 2021, online; Regular Meeting: December 11, 2021, hybrid **Note change of date for meeting** |

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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 | 7.0 | Nov |
| Alphabet | GOOG | Roger | HOLD | HOLD | 4 | 6.3 | Dec |
| Apple | AAPL | Jackie | HOLD | HOLD | 135 | 10.8 | Sep |
| C. H. Robinson | CHRW | Michele | HOLD | HOLD | 103 | 5.2 | Dec |
| CACI International | CACI | Craig (2) | SELL all | HOLD | 40 | 6.1 | Jun |
| Danaher | DHR | Harrison (2) | HOLD | HOLD | 80 | 13.2 | Dec |
| Fastenal | FAST | Rich (1) | HOLD | HOLD | 300 | 9.6 | Dec |
| Fidelity Sel. Healthcare | FSPHX | --- | --- | --- | 338.5150 | 6.3 | --- |
| IRobot | IRBT | Bill | HOLD | BUY | 125 | 6.0 | Dec |
| Illumina | ILMN | Dene (1) | HOLD | HOLD | 15 | 3.1 | Dec |
| Malibu Boats | MBUU | Craig (2) | BUY 30sh | BUY | 30 | 1.1 | Jum |
| Starbucks | SBUX | Harrison (2) | HOLD | HOLD | 80 | 4.8 | Sep |
| Tractor Supply | TSCO | Paul | HOLD | HOLD | 120 | 14.2 | 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**

