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

# Agenda for Sat. May 21, 2022 / 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.  - Guest Q&A afterward - hand raising option, chat box |
| **10:35 Minutes** | - Minutes for April 16, 2022 meeting posted to bivio on April 16, 2022. Corrections or additions? Motion/second to accept |
| **…. Financial Report** | - Current financial report, cash balance: $7,266.77 as of CoB May 13, 2021; no limit orders  - Eugene Burnett final valuation: $2,853.92 |
| **…. BI/OKI Announcements** | - Better Investing National Convention (BINC): June 23-26, Westin Dallas Park Central |
| **10:45 Old Business** | - Recording Partner volunteer?  - Guests are encouraged to join CinMIC |
| **…. New Business** | - CinMIC anniversary celebration – August, Marty/Dene update |
| **11:00 Stock Study** | - Extended discussion in lieu of stock study |
| **11:30 Quarterly Reports** | - 5 min. reports on AAPL, CHRW, DHR, FAST, GOOG |
| **12:00 Portfolio Review** | - Craig: Selecting a stock to present |
| **12:15 Buy/Hold/ Sell** | - Reports must be submitted by Sun, May 15 |
| **12:30 Close** | - Mid-Month Meeting: June 4, 2022, online; Regular Meeting: June 18, 2022, hybrid  - Questions & Answers? 15 mins. |

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| **Stock** | **Symbol** | **Watcher** | **Watcher: Buy/Hold/Sell** | **SSG: Buy/Hold/Sell** | **# of Shares** | **% of Portfolio** | **Year End** |
| Adobe | ADBE | Craig (1) | BUY 5sh | BUY | 25 |  | Nov |
| Alphabet | GOOG | Michele (2) | BUY 1sh | BUY | 7 |  | Dec |
| Apple | AAPL | Kate | HOLD | BUY | 112 |  | Sep |
| C. H. Robinson | CHRW | Roger (2) | HOLD | BUY | 103 |  | Dec |
| Danaher | DHR | Harrison (2) | HOLD | HOLD | 55 |  | Dec |
| Fastenal | FAST | Paul (2) | HOLD | HOLD | 300 |  | Dec |
| Fidelity Sel. Healthcare | FSPHX | --- |  |  | 338.5150 |  | --- |
| IRobot | IRBT | Marty | HOLD | BUY | 125 |  | Dec |
| Malibu Boats | MBUU | Dene | BUY 10sh | BUY | 160 |  | Jun |
| Skechers | SKX | Roger (2) | BUY ?sh | BUY | 30 |  |  |
| Starbucks | SBUX | Rich | BUY 10sh | BUY | 80 |  | Sep |
| T Rowe Price | TROW | Paul (2) | HOLD | HOLD | 45 |  | Dec |
| Tractor Supply | TSCO | Harrison (2) | HOLD | HOLD | 90 |  | Dec |
| Western Alliance | WAL | Michele (2) | HOLD? | BUY | 30 |  | 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) |

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

