# **­**

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

# Agenda for Sat. July 16, 2022 / 10:30a – 12:30p

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

|  |
| --- |
| **MODEL INVESTMENT CLUB DISCLAIMER** The information presented and discussed in this model club meeting is for demonstration and educational purposes only. The securities of companies referenced or featured in the meeting materials, presentation and discussion are for illustrative purposes only and are not to be considered endorsed or recommended for purchase or sale by BetterInvesting™ / National Association of Investors™. The views, opinions expressed and decisions made by club partners regarding the purchase and sale of stocks or other assets are those of the partner(s), and do not necessarily reflect the views and opinions of BetterInvesting. No recommendation to purchase or sell any stock, mutual fund, or other security referenced is being made on behalf of BetterInvesting. Securities discussed may be held by the club partners and presenters in their own personal portfolios or in those of their clients. BetterInvesting presenters and volunteers are held to a strict code of conduct that precludes benefiting financially from educational presentations or public activities via any BetterInvesting programs, events and/or educational sessions in which they participate. Any violation is strictly prohibited and should be reported to the CEO of BetterInvesting or the Director of Chapter Relations. This meeting may contain images of websites and products or services not endorsed by BetterInvesting. The presenter is not endorsing or promoting the use of these websites, products or services. **We may record this session for our future use.**  |

|  |  |
| --- | --- |
| **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 June 18, 2022 meeting posted to bivio on June 19, 2022. Corrections or additions? Motion/second to accept |
| **…. Financial Report** | - Current financial report, cash balance: $3,133.41 as of CoB July 8, 2022; no limit orders |
| **…. BI/OKI Announcements** | - BINC report – Marty, Craig, Dene, Rich |
| **10:45 Old Business** | - Recording Partner volunteer?- Guests are encouraged to join CinMIC |
| **…. New Business** | - Everyone is invited to a Cincinnati Model Investment Club 20th Anniversary Celebration Lunch after the regular meeting on Saturday, August 20th at 1:00 PM at BRAVO! Italian Kitchen; 9436 Waterfront Drive, West Chester, OH 45069. Anniversary Meal is Dutch and cake will be served after the meal!PLEASE RSVP NO LATER THAN AUGUST 6TH! Contact Dene Alden at dene.alden@gmail.com, call or text: 513-476-6747.  |
| **11:00 Stock Study** | - Kate: MKS Instruments (MKSI) |
| **11:30 Education** | - Rich: ESG Scores |
| **11:55 Quarterly Reports** | - 5 min. report on ADBE |
| **12:00 Portfolio Review** | - Marty: CinMIC portfolio review |
| **12:15 Buy/Hold/ Sell** | - Motion/second: action, type, yes/no/abstain |
| **12:30 Close** | - Mid-Month Meeting: August 6, 2022, online; Regular Meeting: August 20, 2022, hybrid - Questions & Answers? 15 mins. |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Stock** | **Symbol** | **Watcher** | **Watcher: Buy/Hold/Sell** | **SSG: Buy/Hold/Sell** | **# of Shares** | **% of Portfolio** | **Year End** |
| Adobe | ADBE | Craig (1) | HOLD | BUY | 25 | 6.6 | Nov |
| Alphabet | GOOG | Michele (2) | HOLD | BUY | 8 | 13.1 | Dec |
| Apple  | AAPL | Kate | HOLD | HOLD | 112 | 11.2 | Sep |
| C. H. Robinson  | CHRW | Roger (2) | HOLD | BUY | 103 | 7.0 | Dec |
| Danaher | DHR | Harrison (2) | HOLD | HOLD | 55 | 9.9 | Dec |
| Fastenal | FAST | Paul (2) | HOLD | HOLD | 300 | 10.3 | Dec |
| Fidelity Sel. Healthcare | FSPHX | --- |  |  | 338.5150 | 6.2 | --- |
| Malibu Boats | MBUU | Dene  | BUY 10sh | BUY | 180 | 6.9 | Jun |
| Microsoft | MSFT | Michael | HOLD | BUY | 10 | 1.8 | Dec |
| Skechers | SKX | Roger (2) | BUY 25 sh | BUY | 50 | 1.3 |  |
| Starbucks | SBUX | Rich | HOLD | BUY | 100 | 5.4 | Sep |
| T Rowe Price | TROW | Paul (2) | BUY 5sh | BUY | 45 | 3.6 | Dec |
| Tractor Supply | TSCO | Harrison (2) | HOLD | HOLD | 90 | 12.5 | Dec |
| Western Alliance | WAL | Michele (2) | BUY 5sh | BUY | 40 | 2.0 | Dec |

|  |  |
| --- | --- |
| **…. Resources** | - Check the CinMIC Portfolio, Core Stocks, Non-Core Stocks, and Stocks to Study 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- 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”.  |

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

