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# **Cincinnati Model Investment Club Twentieth Anniversary Meeting**

# Agenda for Sat. August 20, 2022 / 10:30a – 12:30p

**Online and In-person at Mid Pointe Library, Room C**

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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 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: $1,352.95 as of CoB July 8, 2022; no limit orders  - Change from bivio to iClub SW? |
| **…. 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](mailto:dene.alden@gmail.com), call or text: 513-476-6747. |
| **10:50 CinMIC Celebration** | - CinMIC 20th Anniversary |
| **11:00 Education** | - Roger - How to research companies |
| **11:30 Quarterly Reports** | - 5 min. reports on AAPL, CHRW, DHR, FAST, GOOG, MSFT |
| **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: September 3, 2022, online; Regular Meeting: September 17, 2022, hybrid  - Questions & Answers for guests? 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) | HOLD | BUY | 28 | 7.5 | Nov |
| Alphabet | GOOG | Michele (2) | HOLD | BUY | 160 | 11.8 | Dec |
| Apple | AAPL | Kate | HOLD | HOLD | 112 | 11.9 | Sep |
| C. H. Robinson | CHRW | Roger (2) | HOLD | BUY | 103 | 7.5 | Dec |
| Danaher | DHR | Harrison (2) | HOLD | HOLD | 55 | 9.9 | Dec |
| Fastenal | FAST | Paul (2) | HOLD | HOLD | 300 | 10.2 | Dec |
| Fidelity Sel. Healthcare | FSPHX | --- | Dene/Craig-review? |  | 338.5150 | 5.8 | --- |
| Malibu Boats | MBUU | Dene | SELL 20sh? | HOLD | 180 | 7.8 | Jun |
| Microsoft | MSFT | Michael | HOLD | BUY | 10 | 1.8 | Dec |
| MKS Instruments | MKSI | Kate (Dene) | BUY 10sh | BUY | 10 | 0.7 | Dec |
| Skechers | SKX | Roger (2) | BUY | BUY | 50 | 1.2 | Dec |
| Starbucks | SBUX | Rich | HOLD | BUY | 100 | 5.4 | Sep |
| T Rowe Price | TROW | Paul (2) | BUY 5sh | BUY | 50 | 4.0 | Dec |
| Tractor Supply | TSCO | Harrison (2) | HOLD | HOLD | 90 | 11.3 | Dec |
| Western Alliance | WAL | Michele (2) | BUY 5sh | BUY | 45 | 2.4 | Dec |

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| **…. 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](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**

