



5 LESSONS LEARNED

MCMC Model Club Presentation

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Agenda

1. Better Investing
2. Stock Selection Guide
3. BINC 2020
4. Value Line
5. Learning Center Videos
6. Next Steps

1. BETTER INVESTING

Membership Benefits

1. BETTER INVESTING

Researched the organization and learned about the benefits of becoming a member.

1. Membership Benefits:

1. Exclusive investor publications and resources
2. Dynamic investor community
3. Effective online stock selection and analysis tools

2. Characteristics of a Growth Stock Company:

1. Durable competitive advantage
2. High return on equity
3. A record of strong growth in sales
4. Diverse customer base
5. Capable of surviving tough stretches (Moat)

2. STOCK SELECTION GUIDE

Better Investing Stock
Selection Guide

2. STOCK SELECTION GUIDE

Basic Guidelines for Beginners:

1. Limit growth projections to 15-20%.
2. The future high P/E should be less than 30.
3. Buy only when the upside-downside ratio is 3 to 1 or higher.
4. If the upside-downside ratio is 9 to 1 or higher, then you probably need to lower your forecast low price.
5. Forecast low price should be at least 20% below the current price.
6. Average P/E Ratio for most companies is between 15 – 20.
7. A good Relative Value Ratio would be under 100%, but above 85%.

3. VIRTUAL BINC 2020

JUNE 22nd – 25th, 2020

3. VIRTUAL BINC 2020

LIST OF PRESENTATIONS:

- Monday: Doug Gerlach - Projecting Growth on the SSG From a Down Year
 - **Key Takeaway:** EPS Forecast Tool (Spreadsheet)
- Tuesday: Ken Kavula - Stock Selection Guidelines for Unusual Times
 - **Key Takeaway:** Use historical performance of stock to guide future projections
- Wednesday: Kim Butcher - Investor Checklist
 - **Key Takeaway:** Kim's Value Line checklist example
- Thursday: Suzi Artzberger - Supercharge Your Analysis with SSGPlus
 - **Key Takeaway:** Detail Estimates | New SSG Tool

4. VALUE LINE

Research Guide

4. Value Line

Read a document on how to analyze a Value Line Research Report.

KEY TAKEAWAYS:

1. **Three Important Sections:**
 1. Summary and Index
 2. Selection & Opinion
The latest analysis of the economy & stock market
 3. Ratings & Reports
1,700 individual stock analysis reports
2. **Supplementary Reports**
3. **Glossary of Terms**
 - Detailed breakdown of each table.



In-Depth Guide { Reading a
Value Line
Research Report

5. BI Learning Center

Better Investing
Learning Center

5. Learning Center Videos

I watched numerous webinar videos via the Better Investing Learning Center.

FAVORITE WEBINARS:

1. Ann Cuneaz - Estimating EPS Using the Preferred Procedure
2. Kathleen Richards - Demystifying Section 3
3. Ken Kavula- Judgment and the Stock Selection Guide
4. Stock Up - Strengthen Your SSG Skills in 2020

6. Next Steps

What I'm Currently
Studying

6. Next Steps

I'm currently focusing on the following areas:

1. **Morningstar Research Guide**
 1. How to properly interpret a report.
2. **Stock Comparison Guide**
 1. How to compare stocks in the same industry.
3. **Continue to practice preparing SSG's**
 1. Practice makes perfect.
4. **Stock Study Group**
 1. More sessions with the stock study group.

THANK YOU



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