

Stock Watcher Responsibilities

DRAFT 12-21-11

1. Follow assigned stock(s) regularly for any important changes to the fundamentals. Such information may come from new reports in Value Line, Morningstar, Standard & Poors, etc.
2. Post a quarterly report on bivio as soon as earnings are reported. Using a company's web site for up-to-date information can be helpful. Many companies will send alerts when there is new information if you sign up.
3. Upload an updated SSG when the quarterly report is done, making notes as to any changes from the previous SSG along with an explanation for the changes. Only the first SSG used to buy the company is maintained in bivio until the stock is sold. The current SSG should replace the last quarter's one, keeping track of changes in the notes.
4. Provide brief oral report at a club meeting when scheduled. This report may not follow directly after earnings are report. The stock watcher should alert other members if a brief oral report is needed with a possible buy/hold/sell recommendation. No more than four stock watcher reports should be given in one meeting.
5. Things to watch for:
 - Overvaluation with little potential for a good future return.
 - Possible other stocks to challenge the stock with that would bring better returns.
 - Changes in the industry that might cause all of the companies in that group to decline in price.
 - Changes in fundamentals that significantly affect rational for buying the company.