

Southeastern Michigan Model Club Meeting

08/17/2019 at 10am

Agenda Items		Presenter	Time
1.	<u>Call to Order / Roll Call / Approve Past Minutes</u> <ul style="list-style-type: none"> • Roll Call • Past Meeting Minutes • Next Meeting: Sep 21, 2019 	Ram Ganapathi	10:00
2.	<u>Treasurer's Report</u> Financials Update, Valuation , Cash on Hand.	Cliff Trent	10:10
3.	<u>Presentation</u> <ul style="list-style-type: none"> • Team A – Deep dive of LKQ Corp (Auto Parts) 	Team A	10:20
4.	<u>PERT Report & Stock Watcher Updates</u> <ul style="list-style-type: none"> a. PERT Report: Outliers U/D ratio : LKQ (17: 1), CTSH (11:1) Sales & EPS Growth : AAPL, BKNG, DG, LKQ, ORLY b. Stock watcher updates: 2Q Earnings → V (7/23), ORLY (7/24), LKQ (7/25), AMZN (7/25) AAPL (7/30), CTSH (7/31), BKNG (8/7) c. SSG updates: AAPL/ Sudip → Last update (Sep'18) 	All	10:45
5.	BUY / SELL Discussion <ul style="list-style-type: none"> • Presentation/ PERT report • Motion/Voting 	All	11:30
6.	<u>General Topics</u> <ul style="list-style-type: none"> • Member withdrawal: Alex Bodea • Meeting room: BTPL (Sep'19), BI Small Conf room (Oct'19 – Mar'20) • Roster updates: Aaron Thomas (Address, Phone, Tax ID) 	Ram Ganapathi	11:40
7.	<u>Stocks</u> <ul style="list-style-type: none"> • Study ideas: • Watchlist: https://www.manifestinvesting.com/dashboards/public/RNTA7N6 	All	11:50

8.	<u>Next Meeting Study Assignment</u> (Study Teams) <ul style="list-style-type: none"> • Team B – TBD 	All	11:50
9.	<u>Roundtable</u> <ul style="list-style-type: none"> • New Business • Questions from the Audience 	All	11:55
10.	Adjourn Regular Meeting	Ram Ganapathi	12:00
<p><u>Teleconference via GoTo Meeting</u> https://gotomeeting.com/join/145688913 Meeting ID #145688913</p> <p>Group email: semichganmodel@bivio.com</p>			

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