

Southeastern Michigan Model Club Meeting

03/21/2020 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: Apr 18, 2020 	Ram Ganapathi	10:00
2.	<u>Treasurer's Report</u> Financials Update, Valuation , Cash on Hand.	Brittany	10:10
3.	<u>Presentation</u> <ul style="list-style-type: none"> • Medical Devices Industry 	Team A	10:20
4.	<u>PERT Report & Stock Watcher Updates</u> <ul style="list-style-type: none"> a. PERT Report: Sales and EPS growth below estimates: AMZN, CTSH, MNST, QCOM, V b. Stock watcher updates: 4Q Earnings → AAPL, AMZN, BKNG, ORLY, V, QCOM, CMCSA, FB U/D ratio → Invalid: BKNG, CTSH, RY → FB (20.7), QCOM (12.1), CMCSA (12.8) c. SSG updates: DG (1/19), ORLY (2/19), V (2/19) 	All	10:45
5.	<u>General Topics</u> <ul style="list-style-type: none"> • Meeting room → BTPL: Closed till May 1 • Schedule K1 (2019) • P3 Portfolio Challenge 	Ram Ganapathi	11:30
6.	BUY / SELL Discussion <ul style="list-style-type: none"> • Presentation/ PERT report • Motion/Voting 	All	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 (Study Teams)</u> <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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