

Southeastern Michigan Model Club Meeting

05/16/2020 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: June 20, 2020 	Ram Ganapathi	10:00
2.	<u>Treasurer's Report</u> Financials Update, Valuation , Cash on Hand. https://www.manifestinvesting.com/dashboards/public/SEMIModClub	Cliff	10:10
3.	<u>Presentation</u> <ul style="list-style-type: none"> • Industry – Healthcare/ Biotechnology 	Team C	10:20
4.	<u>PERT Report & Stock Watcher Updates</u> <ul style="list-style-type: none"> a. PERT Report: Sales and EPS below estimates → AAPL, AMZN, V, ORLY, MNST, CTSH CMCSA, QCOM b. Stock watcher updates: 1Q Earnings → AAPL, ISRG, AMZN, V, ORLY, MNST, CTSH, FB CMCSA, QCOM U/D ratio → AAPL (0.5), DG (0.8) c. Last SSG update: DG (1/19), ORLY (2/19), V (2/19), QCOM (5/19) 	All	10:45
5.	<u>General Topics</u> <ul style="list-style-type: none"> ○ BTPL library: Closed for June ○ Club contributions 2020 ○ SEM Stock Picking Contest 2020 ○ Model Club Portfolio Performance 2020 	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: 	All	11:50

	<ul style="list-style-type: none"> • Watchlist: https://www.manifestinvesting.com/dashboards/public/RNTA7N6 		
8.	<u>Next Meeting Study Assignment (Study Teams)</u> <ul style="list-style-type: none"> • Team A - 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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