

Southeastern Michigan Model Club Meeting

07/18/2020 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: Aug 15, 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"> • Defense industry and SSG updates (ISRG, AAPL, ORLY, DG, MSNT) 	Team B	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, RY b. Stock watcher updates: 1Q Earnings → DG, RY U/D ratio → AAPL (Invalid), ISRG (0.4), ORLY (0.5) c. Last SSG update: DG (1/19), QCOM (5/19), RY (6/19) 	All	10:45
5.	<u>General Topics</u> <ul style="list-style-type: none"> ○ BTPL library: Reopening status ○ SEM Stock Picking Contest 2020: Portfolio changes 	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 C - 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 Tel: +1 (215) 383-1002 Access Code: 145-688-913#</p> <p>Group email: semichganmodel@bivio.com</p>			

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