

## Southeastern Michigan Model Club Meeting

### 08/15/2020 at 10am

<b>Agenda Items</b>		<b>Presenter</b>	<b>Time</b>
1.	<u>Call to Order / Roll Call / Approve Past Minutes</u> <ul style="list-style-type: none"> <li>• <a href="#">Roll Call</a></li> <li>• <a href="#">Past Meeting Minutes</a></li> <li>• Next Meeting: Sep 19, 2020</li> </ul>	Ram Ganapathi	10:00
2.	<u>Treasurer's Report</u> Financials Update, <a href="#">Valuation</a> , Cash on Hand. <a href="https://www.manifestinvesting.com/dashboards/public/SEMIModClub">https://www.manifestinvesting.com/dashboards/public/SEMIModClub</a>	Cliff	10:10
3.	<u>Presentation</u> <ul style="list-style-type: none"> <li>• Portfolio Review and Recommendation</li> </ul>	Team C	10:20
4.	<u>PERT Report &amp; Stock Watcher Updates</u> <ul style="list-style-type: none"> <li>a. <a href="#">PERT Report</a>: Sales and EPS below estimates (2Q) → BSTC, CTSH, CMCSA, ISRG QCOM, RY, V</li> <li>b. <a href="#">Stock watcher updates</a>: 2Q Earnings → AAPL, ISRG, V, QCOM, AMZN, MNST CTSH, CMCSA, FB, LMT, BTSC  U/D ratio → AAPL (Invalid), DG (0.4)</li> <li>c. <a href="#">Last SSG update</a>: DG (1/19), QCOM (5/19), RY (6/19)</li> </ul>	All	10:45
5.	<u>General Topics</u> <ul style="list-style-type: none"> <li>○ SEM Stock Picking Contest 2020 – Portfolio changes</li> <li>○ Stock Watcher: LMT, BSTC</li> </ul>	Ram Ganapathi	11:30
6.	<a href="#">BUY / SELL Discussion</a> <ul style="list-style-type: none"> <li>• Presentation/ PERT report</li> <li>• Motion/Voting</li> </ul>	All	11:40
7.	<u>Stocks</u> <ul style="list-style-type: none"> <li>• Study ideas:</li> <li>• Watchlist: <a href="https://www.manifestinvesting.com/dashboards/public/RNTA7N6">https://www.manifestinvesting.com/dashboards/public/RNTA7N6</a></li> </ul>	All	11:50

8.	<u>Next Meeting Study Assignment</u> (Study Teams) <ul style="list-style-type: none"> <li>Team A - TBD</li> </ul>	All	11:50
9.	<u>Roundtable</u> <ul style="list-style-type: none"> <li>New Business</li> <li>Questions from the Audience</li> </ul>	All	11:55
10.	Adjourn Regular Meeting	Ram Ganapathi	12:00
<p><b><u>Teleconference via GoTo Meeting</u></b>  <a href="https://gotomeeting.com/join/145688913">https://gotomeeting.com/join/145688913</a>  Tel: +1 (215) 383-1002  Access Code: 145-688-913#</p> <p>Group email: <a href="mailto:semichganmodel@bivio.com">semichganmodel@bivio.com</a></p>			

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