

Yankee Chapter Model Club Agenda Saturday, January 9, 2021 - 11AM EST

Club Introduction and Announcements - Brent

Educational Segment - Return on Equity Exposed - Ira

Club Secretary Report - Jack / Sriram
 Review and approve past meeting minutes
 Record current meeting minutes

Treasurer Report - Ira / Jack
 Update on current club financial information and brokerage account
 Review current account/portfolio to date totals

Stock to Study - Emergent Biosolutions (EBS) by Jack

Update and Review of Stocks in Portfolio
 Brent ATH, FLT, TSCO
 Steve VISA, GOOG
 Ira REGN, GNTX
 Jack DG, SFM
 Liz ULTA, MIDD
 Sriram INS, MLR

Watch List Update - Jack
 Five Below (FIVE)
 Veeva (VEEV) added 2/8/20
 DR Horton (DHI) added 5/9/20

Club Member Voting Process:
 Vote on investment of current club funds
 Vote on any changes to current portfolio holdings

Old Business:
 "Reasons To Sell" checklist - Sriram

New Business:
 Club financial audit
 Review club calendar

Assignments:	Feb	Mar	Apr	May	Jun
Stock to Study	Brent	Cheryn Watkins	Steve	Liz	New candidate?
Education segment	Liz	Sriram	Brent	Steve	Jack

Adjournment of Club Meeting



Upcoming meetings, all via GoToWebinar at 11:00 AM, Eastern:

Saturday, February 13, 2021

Saturday, March 13, 2021

Saturday, April 10, 2021

Saturday, May 8, 2021