|  |  |
| --- | --- |
| Date & Time | Tuesday Jun 15 2021 0700-0900PM |
| Location | Online ONLY via GoToMeeting |
| Online Information | https://global.gotomeeting.com/join/251997157  You can also dial in using your phone.  United States: +1 (312) 757-3121  Access Code: 251-997-157 |

Agenda

|  |  |  |
| --- | --- | --- |
| 07:00-07:05 PM | Welcome Partners, Regular Guests and First Time Visitors  Call to Order | Jonathan Timmes |
| 07:05-07:10 PM | Member Withdrawal – Kent Billmeyer (per bylaws) | Gladys |
| 07:10-07:15 PM | Future Meetings Survey (Results to be discussed next month) | Baskar |
| 07:15-07:35 PM | Education: One-Page Quick Analysis (Note: Dec segment is open) | Baskar |
| 07:35-07:55 PM | New Stock Presentation: Malibu Boats (Ticker: MBUU) | Sheryl |
| 07:55-08:20 PM | Stock Reports  AAPL - Kathy  BRK.B - Gladys  LGIH - Paul  MNST – Gladys  NVEE – Sheryl | Kathy  Gladys  Paul  Gladys  Sheryl |
| 08:20-08:25 PM | Treasurer’s Report | Gladys |
| 08:25-08:35 PM | Portfolio Pert Chart Review | Sheryl |
| 08:35-08:55 PM | Decision: Buys and Sells | Partners |
| 08:55-09:00 PM | Upcoming Events and Announcements (***see below***) | Jonathan |
| 09:00 PM | Adjourn | Jonathan |

BI and Community Events & Announcements

|  |  |
| --- | --- |
| Wed - Jun 16, 2021  07:00PM-09:00 PM  (3rd Wednesdays) | **Montgomery County Model Investment Club (MCMC) Monthly Meeting**  Visitors are Welcome. Free Event: Online via GoToMeeting  More information at: <https://www.betterinvesting.org/chapters/dc-regional/local-events/model-stock-investment-club-meeting-maryland-jun> |
| Sat - Jun 19,2021 09:15 AM | **AAII May Meeting**  **Speaker**: Rob Bernstein, President, RGB Capital Group LLC  **Topic**: "Seeking Reasonable Returns while reducing risk – A Practical approach to Investing"  <https://aaiidcmetro.com/meetings.htm>  **Cost: $10** |
| Mon -July 12, 2021  07:00PM-08:00PM | **DMV Chapters presents: Digging into the BI Magazine Jul 2021**  Join the DC Regional Chapter along with the Maryland Chapter of  BetterInvesting for free webinar where we examine the featured stocks from  the most recent issue of the BI Magazine. This event is designed for both  beginners and those looking to improve their judgment on the SSG. In a little  over an hour, we will have four stock presentations using the current issue of  BI Magazine or using the features from the BI website.  INVITE YOUR ATTENDEES  Registration URL:  <https://attendee.gotowebinar.com/register/1110318043637733901>  Webinar ID  954-500-211 |
| Tue - July 13, 2021  07:30PM-09:00PM  (2nd Tuesdays) | Money Matters (Book Club)  June Title: **The Psychology of Money: Timeless Lessons on Wealth, Greed and Happiness**  **By Morgan Housel, 2020, 242 p.**  The author uses 19 stories to illustrate why we make bad financial decisions and shows how we can make better ones. A must-read for those wishing to make better decisions and lead a richer life. |
| Tue - July 20, 2021  07:00PM–09:00PM  (3rd Tuesdays) | MicNOVA Model Investment Club (MicNOVA) Monthly Meeting. Visitors are welcome. Free Event: Online via GoToMeeting.  More information at: <https://www.betterinvesting.org/chapters/dc-regional/local-events/model-stock-investment-club-meeting-nova-may> |
| Sat - July17, 2021  9:30AM - 02:00PM | DC Chapter Annual Planning Meeting to be held at Bethesda, MD. Open for Chapter Directors and Members of the DC Area Club. The meeting is available online as well through GoToMeeing.  Registration URL: <https://global.gotomeeting.com/join/784950237>  You can also dial in using your phone.  (For supported devices, tap a one-touch number below to join instantly.)  United States: +1 (571) 317-3112  One-touch: tel: +15713173112,,784950237#  Access Code: 784-950-237 |
| 90 Days to Try SSG Free | Better Investing offers Non-Members to try SSG Plus/Core SSG for FREE.  Check out: <https://www.betterinvesting.org/find-great-stocks/online-tools> |
| BINC 2021  10/21/2021-10/24/2021 | BetterInvesting National Convention  The Westin Dallas Park Central - Texas |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Name | New Stock Presentation | Conduct MicNova Monthly Meeting | Conduct MicNova Planning Meeting |
| 1 | Patterson, Shervl | 6/15/2021 | 11/16/2021 | 11/11/2021 |
| 2 | Billmver, Kent | ~~11/17/2020~~ | ~~12/15/2020~~ | ~~12/10/2020~~ |
| 3 | Hughes, James A.(Ty) | ~~1/19/2021~~ | 10/19/2021 | 10/14/2021 |
| 4 | Krishnarao, Maskev, Sec. | 11/16/2021 | 5/18/2021 | 5/13/2021 |
| 5 | Krishna, Arvind K | 10/20/2020 | 8/17/2021 | 8/12/2021 |
| 6 | Arumugam, Baskar | ~~2/16/2021~~ | 10/20/2020 | 10/15/2020 |
| 7 | Henrikson, Gladys | ~~3/16/2021~~ | 09/21/2021 | 09/16/2021 |
| 8 | Murphy, Josephine C (Jo) | 12/15/2020 | ~~1/19/21~~ | ~~1/14/2021~~ |
| 9 | Emmons, Elinor (Kathy) | 9/15/2020 | ~~2/16/2021~~ | ~~2/11/2021~~ |
| 10 | Laing, Amy Gay | 5/18/2021 | ~~4/20/2021~~ | ~~4/15/2021~~ |
| 11 | Nixon, Wilbert | 9/21/2021 | 7/20/2021 | 7/15/2021 |
| 12 | Onufrak, Patricia | 7/20/2021 | ~~3/16/2021~~ | ~~3/11/2021~~ |
| 13 | O’Mara, W. Paul | 8/17/2021 | 11/17/2020 | 11/12/2020 |
| 14 | Timmes, Jonathan | ~~4/20/2021~~ | 6/15/2021 | 6/10/2021 |

Schedule: New Stock Presentation, Planning and Monthly Meeting Chair

Last Month This Month Next Month

Schedule: Education

|  |  |  |  |
| --- | --- | --- | --- |
|  | Title | Presenter | Date |
| ~~1~~ | ~~How to present 5-min stock report(Ticker Talk Webinar Ken K)~~ | ~~Sheryl/Ken K Video~~ | ~~10/20/2020~~ |
| ~~2~~ | ~~How to invest in ETFs - such as in the gaming programs, like NERD~~ | ~~Linda Hunt~~ | ~~11/17/2020~~ |
| ~~3~~ | ~~Stock screening in the BI SSG (Part 1 of 2)~~ | ~~Baskar~~ | ~~12/15/2020~~ |
| 4 | ~~How to use cash flow vs P/E to determine investability in a new/young company~~ | ~~Gladys & Carol~~ | ~~1/19/2021~~ |
| 5 | ~~Other good sources for finding good stock ideas: Ticker Talk, Stock-up, Manifest, VL, MS, Barrons, Invest Adv Svc, WSJ, Other Newsletters (Part 2 of 2)~~ | ~~Jo Murphy~~ | ~~2/16/2021~~ |
| 7 | ~~How to do “Preferred Procedure” in SSG~~ | ~~Kathy~~ | ~~4/20/2021~~ |
| 8 | ~~PERT Charts from the SSG/SSG Plus~~ | ~~Sheryl~~ | ~~5/18/2021~~ |
| 9 | One page Quick Analysis of a Stock | Baskar | 6/15/2021 |
| 10 | How to navigate and use Yahoo Finance as a source for stock ideas and analysis. | Jonathan | 7/20/2021 |
| 11 | Ratios using Price | Gladys/Sheryl | 8/24/2021 |
| 12 | Exploring the "Research" Tab in SSG | Arvind | 9/21/2021 |
| 13 | Different types of orders you can place with your broker (Limit, Market, Trailing, Stop Loss) | Amy | 10/19/2021 |
| 14 | Basics of using Stock (price) charts to see if/when stock is in Buy Zone (with cheat sheets for 50/200 day Moving avg & RSI, other ratios | Ty/Wilbert | 11/16/2021 |
| 15 |  |  | 12/21/2021 |
|  |  |  |  |
|  | How to calculate a Signature P/E (Bonnie Biafort Book) | Linda |  |
|  | Alternative approaches to constructing & managing a portfolio: style, industry; performance to S&P 500 |  |  |
|  | Introducing Detailed Estimates in SSG Plus (1 of 2) ; Add Analyst Estimates to Your SSGs : Ticker Talk July 2020 |  |  |
|  | "Research and Your SSG" , 2nd of 2 "Adding Judgement" programs (Stock-up Sept 10 2020- Ken Kavula/Ann Cuneaz). Gt tips for what to  look for in Value Line, Morningstar, CFRA, Company reports and more. |  |  |
|  | New Tools/Capabilities in the SSG. |  |  |
|  | Addressing anomalies in Stock & Market performance |  |  |
|  | Putting together Powerpoint Presentation (For new stock presentation) - What should the presentation answer?, snipping tool, Strawman outline - maybe a Sat morning |  |  |
|  | Understanding /Applying various financial terms: "Book Value," "Cash Flow," Current Ratio, Quick Ratio, Peg Ratio |  |  |
|  | Stock Screening BI Weekly Emails |  |  |
|  |  |  |  |