**MicNOVA Sep 2024 Meeting Agenda**

| **Meeting Location** | Online via Go-To Meeting |
| --- | --- |
| **Meeting Date & Time** | Sep 10 2024 07:00 PM - 09:00 PM |
| **Online Meeting** | 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 |

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**Agenda**

| 07:00 - 07:05 PM | Welcome Regular Guests and First Time Visitors  Disclosure: Better Investing | Andrew |
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| 07:05 - 07:07 PM | Secretary’s Minutes | Arvind/Maskey |
| 07:07 - 07:09 PM | Bivio restructuring committee update | Ty, Kathy, Patrick, Andrew |
| 07:09 - 07:10 PM | Treasurer’s report  Bivio valuation report | Gladys |
| 07:10 - 07:35 PM | **Education**: Exploring the Ratios Tab in SSG | Lisa |
| 07:35 - 07:55 PM | **New Stock Presentation**: Inmode (Ticker:INMD) | Baskar |
| 07:55 - 08:35 PM  (8 Stock Reports) | Stock Watchers ( Please share the Online SSG with all MicNOVA members)  Portfolio:   * ADUS (Sheryl) * APD (Andrew) * AAPL (Lisa) * EXLS (Maskey) * IRMD (Ty) * MNST (Kathy) * PYPL (Pat) * V (Baskar) | Sheryl  Andrew  Lisa  Maskey  Ty  Kathy  Pat  Baskar |
| 08:35 - 08:40 PM | Portfolio Review and Tools | Ty |
| 08:40 - 08:50 PM | Decision: Buys and Sells | Partners |
| 08:50 - 08:55 PM | Upcoming Events and Announcements | Andrew |
| 09:00 | Adjourn | Andrew |

**2024 BI and Community Events & Announcements**

| Sat Sep 14 11:30 AM - 02:00 PM | DC Chapter Meeting & Potluck |
| --- | --- |
| 9/5/2024 - 10/3/2024 | Introduction to Stock Selection Series  https://www.betterinvesting.org/learn-about-investing/our-events/intro-to-ssg-series-(1) |
| Tue Sep 17 2024 07:30 - 09:00 PM  (Third Tuesdays of Month) | Interview: The LongView: Anne Lester - You’re Bad at Savings and It’s Not Your Fault  Book: Living Your Best Financial Life: Save Smart Now for the Future You Want  [Online via GTM](https://global.gotomeeting.com/join/804623085): You can also dial in using your phone.  United States: +1(646) 749-3122  One-touch: tel:+16467493122,,804623085#  Access Code: 804-623-085 |
| Wed Sep 18 07:00 - 09:00 PM  Wed Oct 20 07:00 - 09:00 PM  (3nd Wednesdays of Month) | MCMC Monthly Meeting  <https://global.gotomeeting.com/join/745127301>  You can also dial in using your phone.  (For supported devices, tap a one-touch number below to join instantly.)  United States: +1 (872) 240-3311  - One-touch: tel:+18722403311,,745127301#  Access Code: 745-127-301 |
| Tue Sep 24 08:00-09:30 PM | Round Table |
| Mon Oct 7 2024 07:00 - 08:15 PM | Digging into BI Magazine  Registration URL: <https://register.gotowebinar.com/rt/6574788583850753036>  Webinar ID:729-893-259 |
| Tue Oct 8 07:00 - 09:00 PM  (2nd Tuesdays of Month) | MicNOVA Monthly Meeting Online  <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 |

**Schedule: New Stock Presentation, Planning and Monthly Meeting Chair**

| **Sl No** | **Monthly Meeting Date** | **Education** | **New Stock** | **Monthly Meeting** | **Planning Meeting Date** |
| --- | --- | --- | --- | --- | --- |
| 1 | 13-Aug-24 | Jo | Pat | Arvind | 6-Aug-24 |
| 2 | 10-Sep-24 | Lisa | Baskar | Andrew | 3-Sep-24 |
| 3 | 8-Oct-24 | Gladys | Patrick | Ty | 1-Oct-24 |
| 4 | 12-Nov-24 | Paul | Sheryl | Paul | 5-Nov-24 |
| 5 | 10-Dec-24 | Kathy | Arvind | Sheryl | 3-Dec-24 |

| 1 | 14-Jan-25 | Maskey | Paul | Patrick | 7-Jan-25 |
| --- | --- | --- | --- | --- | --- |
| 2 | 11-Feb-25 | Arvind | Gladys | Jo | 4-Feb-25 |
| 3 | 11-Mar-25 | Andrew | Kathy | Gladys | 4-Mar-25 |
| 4 | 8-Apr-25 | Pat | Jo | Kathy | 1-Apr-25 |
| 5 | 13-May-25 | Baskar | Maskey | Pat | 6-May-25 |
| 6 | 10-Jun-25 | Sheryl | Andrew | Lisa | 3-Jun-25 |
| 7 | 8-Jul-25 | Patrick | Ty | Baskar | 1-Jul-25 |
| 8 | 12-Aug-25 | Ty | Lisa | Maskey | 5-Aug-25 |
| 9 | 9-Sep-25 | Jo | Pat | Arvind | 2-Sep-25 |
| 10 | 14-Oct-25 | Lisa | Baskar | Andrew | 7-Oct-25 |

**Stock Watcher Reports**

| **MicNOVA Portfolio Updated with closing prices as of 08/28/2024** | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Ticker** | **Stock** | **Bought** | **Date** | **Closing Prices Asof** | **Percentage Of** | **No Of** | **Earnings** | **EPS** | **Stock Watcher** |
| **Symbol** | **Watcher** | **Price** | **Bought** | **08/28/24** | **portfolio** | **Shrs** | **Date** | **Quarter** | **Reports Due** |
| Addus | Sheryl | 98.73 | 3/14/24 | 60 | 7.00% | 60 | 1-Aug-24 | Q2 | May, Aug, Dec, Feb |
| ADBE | Andrew | 436.57 | 1/20/21 | 23 | 11.90% | 23 | 18-Aug-24 | Q3 | May, Aug, Dec, Feb |
| APD |  | 259.07 | 7/11/24 | 15 | 4.60% | 15 | 1-Aug-24 | Q3 | May, Aug, Dec, Feb |
| ALNT | Arvind | 29.85 | 2/14/24 | 117 | 6.40% | 129 | 5-Aug-24 | Q2 | May, Aug, Dec, Feb |
| GOOGL | TY | 46.29 | 12/16/16 | 73 | 1.10% | 117 | 9-Jul-24 | Q3 | May, Aug, Dec, Feb |
| AAPL | lisa | 12.77 | 6/21/11 | 165 | 5.90% | 73 | 5-Aug-24 | Q3 | Feb, May, Nov, Feb |
| EXLS | Maskey | 30.24 | 1/10/24 | 284 | 6.90% | 165 | 29-Jul-24 | Q2 | Feb, May, Nov, Feb |
| GNTX | Jo | 20.46 | 6/19/14 | 157 | 8.00% | 284 | 30-Jul-24 | Q3 | May, Aug, Nov, Feb |
| IRMD | Ty | 41.59 | 4/10/24 | 43 | 1.30% | 157 | 5-Aug-24 | Q2 | May, Aug, Nov, Feb |
| MSFT | Patrick | 25.44 | 9/17/09 | 140 | 5.50% | 43 | 29-Aug-24 | Q1 | Nov, Feb May, Aug |
| MNST | Kathy | 33.14 | 3/13/20 | 80 | 5.90% | 140 | 5-Aug-24 | Q2 | May, Aug, Dec, Feb |
| PYPL | Pat | 62.12 | 8/9/23 | 20 | 2.30% | 80 | 5-Aug-24 | Q2 | May, Aug, Dec, Feb |
| SSD | Patrick | 97.22 | 12/14/22 | 26 | 5.80% | 20 | 26-Jul-24 | Q3 | May, Aug, Dec, Feb |
| TSCO | Paul | 189.48 | 9/23/22 | 36 | 4.00% | 26 | 28-Oct-24 | Q3 | May, Aug, Dec, Feb |
| V | Basker | 94.12 | 9/18/14 | 35 | 10.20% | 36 | 29-Jul-24 | Q3 | Feb, May, Aug, Nov |
| VTI |  | 236.95 | 1/10/24 | 23 | 5.70% | 35 |  |  |  |
| VRTX | Lisa | 207.26 | 4/21/21 | 159 | 5.70% | 23 | 1-Aug-24 | Q2 | May, Aug, Nov, Feb |
| WAL | Gladys | 39.16 | 12/15/22 | 80.46 | 7.40% | 159 | 22-Jul-24 | Q3 | May, Aug, Dec, Feb |
|  |  |  |  |  |  |  |  |  |  |