

Model Investment Club (MIC) of St Louis VIRTUAL – Go To Meeting format

Agenda

10 February 2025 7:00 PM - 9:00 PM (CDT)

Please join our meeting from your computer, tablet or smartphone

<https://meet.goto.com/917645637> or You can also dial in using your phone.

(For supported devices, tap a one-touch number below to join instantly.)

United States: +1 (571) 317-3122

- One-touch: tel:+15713173122,,917645637#

Access Code: 917-645-637

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Welcome Visitors, Disclaimer

Attendance & Proxies (requires written/email FYI)

Minutes Review / Approval: Casey

Treasurer's Report & Dues: Ginny

Portfolio Review:

Stock Reports: Stock Watcher complete report: **Month of February: APD, GOOG, CPAY, MSFT, V, SLB, AMZN,** (Value Line and/or Qtrly Earnings reports are current.) Consider VL Industry & competitors when reviewing.

Guidance: One **monthly** written StockWatcherReport per stock by collaboration between the two watchers Bivio post pls. **Quarterly** SSG estimate update with new VL to Candace.

Fill out StockWatcherReport spreadsheet completely; SSG (review/update) to Candace.

All other stocks: Fill out Information section Lines 3 – 7, Lines 9-12, Lines 15- 19 of StockWatcherReport spreadsheet.

This is a great hotlink to our portfolio, and it is interactive. Try it out.

<https://www.manifestinvesting.com/dashboards/public/PCDCJA>

Stock	Watcher	Watcher	Stock	Watcher	Watcher
APD	Mark	Joan	EXLS	Stevens	Janet
GOOG	Kim	Mark	MSFT	Dahlem	Casey
AMZN	Casey	Joan	NVDA	Stevens	Kim
SLB	Mark	Dahlem	V	Ginny	Dahlem
CPAY	Janet	Ginny			

Education: Candace “Using Value Line as a Reality check”

Watch List: KNSL – impact on insurance bizness from the Los Angles, CA fire disaster?

Stock to Study: ADUS SSG estimates no later than 8 February, Saturday to Candace. Healthcare Too highly leveraged? Negative ROE.

Consider Travel Companies for March, ZTS

Motions: Buys & Sells

New/Old Business:

1 26 February Luncheon (4th Wed/month 1PM) Sports Café Bar&Grill, 3579 Pennridge Rd, Bridgeton,MO.

2 January/February 2025 audit of the Club for fiscal year 2024.

3 Beneficiary Form

Q & A from Visitors