

3C CTG- Creating a Watch List

Sandy Barlow

Creating a Watch List




Sandra F. Barlow
BIVA Board Director

 **BETTERINVESTING**
The Leader in Investment Education

Classes-to-Go! 3C

Disclaimer

- The information in this presentation is for educational purposes only and is not intended to be a recommendation to purchase or sell any of the stocks, mutual funds, or other securities that may be referenced.



2

Four Areas Bear Watching

1. Stocks that your club owns
2. The stocks your club assigned you to watch
3. Stocks that you seriously may buy
4. Stocks you've heard about and want to keep an eye on

3

Good Management of Club

- Have a Watch List of stocks you may consider buying in the future
- Clubs meet (usually) once a month
- Sometimes it takes 2 or 3 meetings to decide which stock to study and then study it.....
- Why not keep a list so you're ready to make a decision to buy when the time comes

4

Today:

- Finding stocks to watch
- Watching vs monitoring
- Setting up an organized system

5

Finding Stocks to Study

- BetterInvesting's Stock to Study, BI's 100 Index, Webinars, BI Chat Lists, Phil Keating's screens, First Cut
- Value Line's Model Portfolios and Highlighted Stocks
- Barron's
- Other publications, various Web sources, various screening procedures
- ~~TV personalities~~

6

3C CTG- Creating a Watch List Sandy Barlow

BETTERINVESTING NATIONAL CONVENTION

Value Line's Model Portfolios

- Portfolio 1 – Stocks with above average year-ahead price potential
- Portfolio 2 – Stocks for income and potential price appreciation
- Portfolio 3 – Stocks with long-term price growth potential
- Portfolio 4 – Stocks with high dividend yield

7

BETTERINVESTING NATIONAL CONVENTION

VL Portfolio 3 Stocks with Long-Term Price Growth Potential 3-12-10

Ratings & Reports Page	Ticker	Company	Recent Price	Time-liness	Safety	P/E	Yield%	Beta	3- to 5-yr Appreciation Potential	Industry Name
1540	AFL	Atlat. Inc.	49.94	1	3	10.2	2.5	1.15	40 - 100%	Insurance (Life)
771	CVS	CVS Caremark Corp.	34.66	3	1	12.8	1.0	0.80	75 - 115	Pharmacy Services
1593	CELG	Celgene Corp.	61.49	2	2	26.7	Nil	0.80	95 - 160	Drug
751	CSCO	Cisco Systems	24.61	1	1	19.8	Nil	0.95	20 - 65	Telecom. Equipment
2323	DIS	Disney (Walt)	31.88	2	1	15.9	1.1	1.00	90 - 120	Entertainment
2398	ESV	Esco Int'l plc	45.48	3	3	9.6	0.2	1.25	45 - 110	Oilfield Svcs/Equip.
2620	GOOG	Google Inc.	541.06	2	2	22.9	Nil	0.90	65 - 125	Internet
2400	HML	Halliburton Co.	31.21	3	3	26.7	1.2	1.35	10 - 75	Oilfield Svcs/Equip.
2309	HOG	Harley-Davidson	24.92	4	1	99.7	1.6	1.50	20 - 80	Recreation
1920	HRL	Hormel Foods	41.83	3	1	15.2	2.0	0.65	45 - 80	Food Processing
208	JNJ	Johnson & Johnson	63.44	3	1	13.0	3.2	0.60	60 - 95	Medical Supplies
1922	K	Kellogg	52.61	3	1	15.0	2.9	0.60	45 - 80	Food Processing
2405	NOV	National Oilwell Varco	44.03	3	3	11.9	0.9	1.60	35 - 105	Oilfield Svcs/Equip.
561	NOC	Northrop Grumman	62.91	3	1	11.8	2.9	0.80	85 - 115	Aerospace/Defense
1971	PEP	PepsiCo, Inc.	63.00	3	1	16.0	2.9	0.60	55 - 95	Beverage
646	DXG	Quest Diagnostics	56.65	3	2	13.8	0.7	0.65	40 - 85	Medical Services
2345	HOT	Starwood Hotels	38.81	3	3	70.6	0.5	1.55	5 - 55	Hotel/Gaming
1790	X	U.S. Steel Corp.	55.30	3	3	NMf	0.4	1.75	25 - 100	Steel (Integrated)
649	UNH	UnitedHealth Group	33.95	2	2	11.2	0.1	1.00	90 - 150	Medical Services
1384	XLNX	Xilinx Inc.	26.30	3	3	16.5	2.4	0.90	50 - 110	Semiconductor

BETTERINVESTING NATIONAL CONVENTION

Live or recorded stock studies, Webinars

9

BETTERINVESTING NATIONAL CONVENTION

Very Serious Watching!

- Set up a portfolio for stocks to watch in Toolkit
- Must complete a Stock Selection Guide for each stock
- Follow stocks in PERT and Review

10

BETTERINVESTING NATIONAL CONVENTION

If indicators are positive.....

- Re-do Stock Selection Guide
- Check Value Line or other outside source
- Decide if it's right for your allocation

11

BETTERINVESTING NATIONAL CONVENTION

Use Portfolio Manager 5?

- Import Toolkit Watch List
- Then import the buy/sell alerts and use as price alerts in PM5
- Matt Willms will be in the Lab if you want a demonstration

12

3C CTG- Creating a Watch List Sandy Barlow

BETTERINVESTING NATIONAL CONVENTION

Set up a Watch List....

- myclub.com (demonstration in Lab)
- Your brokerage site
- Yahoo Finance
- Various membership sites

13

BETTERINVESTING NATIONAL CONVENTION

Example Yahoo Watch Portfolio

Symbol	Last Trade	Change	Volume	Shares	Holdings Value	Day's % Value Change	Price Paid	Gain/Loss	Related Info
CHRY	Mar 12 53.87	▲0.41	1,710,750	270	\$14,544.90	▲0.17%	37.00	▲\$4,154.90	▲45.59%
DCI	Mar 12 44.74	▲0.31	431,714	270	\$12,079.80	▲0.70%	35.00	▲\$2,258.80	▲24.28%
EBK	Mar 12 47.23	▲0.12	410,072	270	\$4,652.10	▲0.26%	37.00	▲\$5,237.00	▲53.47%
FPO	Mar 12 34.25	▲0.37	990,421	360	\$12,330.00	▲1.09%	28.00	▲\$2,268.00	▲22.32%
HRF	Mar 12 58.10	▲0.85	1,442,949	240	\$14,464.40	▲1.42%	41.00	▲\$4,426.40	▲44.29%
HSC	Mar 12 258.96	▲6.16	398,898	10	\$21,524.00	▲2.31%	164.00	▲\$11,864.00	▲118.64%
OIB	Mar 12 58.25	▲0.64	405,275	185	\$10,776.25	▲1.11%	54.00	▲\$1,962.25	▲21.71%
Total					\$98,491.45	▲2.21%		▲\$20,748.45	▲28.78%

14

BETTERINVESTING NATIONAL CONVENTION

Watch and monitor to stay on course.....

15

BETTERINVESTING NATIONAL CONVENTION

BetterInvesting principles can help us build our wealth

Better Investing!

16

BETTERINVESTING NATIONAL CONVENTION

Questions?

17