

BetterInvesting's™ Online Chapter Monthly Bulletin

July 2023

Volume 2, Issue 7

What's New?

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Doug Gerlach - Stocks in the "Maybe" Zone and Online Chapter Annual Meeting

Mark and save your calendar for the Online Chapter Annual Meeting and a special Presentation by renowned BI presenter, Doug Gerlach .

When: Monday, August 7, 2023

Agenda

- 8:00 PM ET Online Chapter Annual Meeting
- 8:30 PM ET Doug Gerlach - Stocks in the "Maybe" Zone

Doug Gerlach - Stocks in the "Maybe" Zone

While many stocks are often clear buys, sell, or holds, many stocks sit squarely in the "Maybe" zone. These may be stocks currently owned in a portfolio that have uncertain prospects, or they may be candidates for purchase about which some particular questions remain inconclusive. Frustratingly, some of these stocks may turn out to be stocks that should have been sold from the portfolio long ago, while others go on to reach record highs - but only after an investor or investment club passes on the purchase.

Is it possible to resolve doubts about companies in these situations? Can an investor make a reasonable decision to buy, sell, or hold these stocks on the cusp? In this session, Doug Gerlach will present the "uncertainty principles" of investing in stocks, and review methods for coping with stocks that are in the

"Maybe" zone. In addition, Doug will discuss some stock ideas from the SmallCap Informer and Investor Advisory Service newsletters that may (or may not) turn out to be in your own personal "Maybe" zone!

[REGISTER](#)

OLC Mentoring Workshop

The May Open Forum Workshop was a great success with our own Howard Johnson sharing his experience with a mistake that many clubs make: not selling stocks. He gave an excellent presentation: Knowing When to Sell. If you missed the Workshop, catch the recording on YouTube channel: [BIOLC](#)

The next Open Forum Workshop is on **Wednesday, July 19th at 8:30pm ET**. Topic will be about considering Crypto and OTC as part of an investment plan.

The meeting is simulcast on the BetterInvesting Online Chapter [Facebook](#) group and then uploaded to the OLC [YouTube](#) channel, where you can find all previous episodes.

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Chris McCarron, [Membership Training & Education Chair](#)

Membership and Club Visits

The Online Chapter has volunteers actively visiting clubs. You may wonder - what happens during a club visit?

A club visit is arranged during your scheduled club meeting. Your club selects the date and time. If we have a local volunteer, you may elect to have the volunteer visit in person. We usually visit virtually through your meeting software or ours.

If you are celebrating a milestone anniversary, we will make a formal presentation with a certificate signed by Ken Zendel, the president of BetterInvesting.

Your club might enjoy a discussion of how the volunteer's investment operates. It is a chat among colleagues. Perhaps your club would like to review using the Stock Selection Guide or an introduction to how to begin. There are new, rich features recently added. We have done a review for one club, the session enhanced their understanding and usability of the tools.

Maybe your club would like a discussion on finding new companies to invest in, how to research companies or the topic we all struggle with - when to sell.

Bottom line, we are here to support you, the BetterInvesting Online Chapter members. Your club visit may be tailored to your club.

Would you like to be a volunteer that visits clubs? We are actively seeking volunteers. Please contact us.

Visit our [Chapter Website](#) for more details or email membership@online.betterinvesting.net.

OLC Portfolio 2023-2024 Contest

The Online Chapter Board has endorsed having a September 1, 2023 to July 31, 2024 Portfolio Contest. Each virtual (i.e., not cash) portfolio must consist of 4 to 7 stocks, initially worth a total of \$100,000. For more information click on the links below:

Note: Entry deadline August 31, 2023

- To enter, complete the Portfolio [Contest Entry Form](#).
- For more information review the [Contest Rules](#).

Questions or comments: email contact@online.betterinvesting.net with “Portfolio Contest” in the subject line

OLC Portfolio 2022-2023 Contest

Since May 26th, the drafting of the last report on the Portfolio Contest, both the average contest portfolio and the S&P 500 index showed solid gains, with the average portfolio outpacing the S & P 500 by 6.67% to 5.8%. Since the beginning of the contest, the average of the contests’ portfolios has outperformed the S & P index 18% vs. 12.5%. Bravo BI approach!

The standings of the Portfolio remained very steady during June, with Yuval Goldberg’s portfolio moving from second to first rank. Each of his stocks increased 9 to 12 percent. The Emanon Investment Club’s portfolio gained the most ranks, three, helped by gains in six of their seven stocks, the strongest being Netflix. With a 35.5% jump, Tesla, held by Marie Bartolotta and Laurie Mulligan, was the stock that advanced the most.

OLC 2022-23 Portfolio Contest : Entrants' Standings

		7/2/2023
Club	Initial Investment	Current Value
Yuval Goldberg	\$100,000	139,749.76
Marie Bartolotta	\$100,000	138,217.87
Mihai Buciu	\$100,000	132,869.14
Emanon Investment Club	\$100,000	132,014.64
Patsy Freeman	\$100,000	130,865.61
Laurie Mulligan	\$100,000	129,626.37
Prairie Investment Partnership	\$100,000	128,648.10
Kaye Light	\$100,000	126,715.14
Financial Escape Investment Club	\$100,000	126,450.83
Bob Houle	\$100,000	124,692.52
Let It Ride Investors of Carson Valley	\$100,000	123,965.23
Two Rivers Investment Group	\$100,000	120,213.41
Barbara J Drake	\$100,000	117,286.86
Cincinnati Model Investment Club	\$100,000	105,031.84
ISABEL S CARRILLO	\$100,000	95,695.00
timur yildiz	\$100,000	93,049.61
Yankee Model Club	\$100,000	91,445.30
Carolyn Odio	\$100,000	91,191.51
Franklin W. Fenton	\$100,000	90,578.07
	\$0	\$0.00
Grand Total	\$1,900,000	\$2,238,306.80

This year's contest will run through July 31, 2023. The entrants, their portfolios, and their standings can be viewed by clicking on [Portfolio Summary](#) and [Portfolio Details](#). Yuval Goldberg holds shares of PayPal. The Google data feed for PayPal works sometimes but not always. Thus, the total for that portfolio may not be showing.

If you have any questions or suggestions for further improvements, please share them with us by email at contact@online.betterinvesting.net with "Portfolio Contest" in the subject line.

Dan Perlman, Portfolio Contest Chair

Recurring "Quick Access Links"

BetterInvesting™ National News

Part of your membership benefit package is enrollment in *BI Weekly*. Every Thursday, BetterInvesting™ emails all members a bulletin listing national webinar registrations, StockUps, TickerTalks, First Cut Stock Reports and more. You don't want to miss it!

If you are not receiving your *BI Weekly*, go to your [BI member profile](#) and update your *Email and Product Subscription Information* selections to let BI you would like to routinely receive this valuable weekly bulletin.

Model Investment Club Meetings

Model Investment Club meetings are sponsored by the BetterInvesting Online Chapter. They are FREE and open to all.

[Yankee Model Stock Investing Club - REGISTER](#)

- Meets the 2nd Saturday of each month
- Next Meeting: **Saturday, July 8** at 11:00 AM ET

[International Model Stock Investing Club - REGISTER](#)

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: **Monday, July 17** at 8:30 PM ET

July, 2023

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