

BetterInvesting's™ Online Chapter Monthly Bulletin

February 2025

Volume 5, Issue 1

What's New?

OLC Presidents' Message	Online Chapter Presidents' Committee Update
OLC Mentoring Workshop	January Mentoring Workshop - Register
2024-2025 Portfolio Challenge	OLC Annual Portfolio Contest 2024-2025
Call for Presenters	Open Invitation to Present at our OLC Educational Events
Tip of the Month	Here is an Educational Tip of the Month from the OLC
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Volunteers	Join us
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BI National News	Recurring Quick Access Links

Online Chapter Presidents' Committee Message

Dear BetterInvesting Online Chapter Members,

With the constant flurry of political activity, it's easy to feel like we're perpetually chasing a moving target. Markets react to decisions made one day, only to pivot as those decisions are challenged in court the next. The resulting fluctuations can leave us feeling as if we're on an unpredictable rollercoaster.

So, let's shift the focus to something more constructive and relevant to our investing pursuits.

Fortune's List of the World's Most Admired Companies: Does It Matter?

Fortune has recently published its list of the World's Most Admired Companies. This raises a few important questions: Do these rankings influence your stock analysis? Do you consider aspects like good governance, respect for employees, and client satisfaction when evaluating a company's financial health? Or do you view these as expensive and unnecessary?

We'd love to hear your thoughts on this topic.

Here is Fortune's list of the top 10 most admired companies, along with their total returns over the past five years. These companies are well known to BetterInvesting members, frequently appearing in the top holdings of many investment clubs and often featured in our magazine and First Cuts on the website.

Rank	Company	Ticker	5 Year Total Return
1	Apple	AAPL	253%
2	Microsoft	MSFT	178%
3	Amazon	AMZN	129%
4	Nvidia	NVDA	2114%
5	Berkshire Hathaway	BRK.B	113%
6	Costco Wholesale	COST	234%
7	JPMorgan Chase	JPM	102%
8	Walmart	WMT	157%
9	Alphabet	GOOG	165%
10	American Express	AXP	169%

As you can see, each of these companies has at least doubled its total return over the past five years, making them solid investments. However, this prompts another question: Were there other companies with even better returns that weren't necessarily as well-regarded?

We invite you to ponder this: If an investment provides a significant return and also appears on the World's Most Admired Companies list, does that increase its value to you? Would you prefer this investment over one with a similar return but a lower ranking or not on the list at all?

Please share your thoughts and let us know what you think.

Please share yours at: contact@online.betterinvesting.net

Presidents' Committee,
Jie Eagleson, Susanne Koster, Chris McCarron, JoAnne Obata

OLC Mentoring Workshop

Do you want to jump on the Crypto Bandwagon?

Are you wondering if there's a "safe" way to invest?

Is the information that you hear contradictory and confusing?

Join us for our March's Mentoring Open Forum when David Doss will share his knowledge and research on crypto funds and investment opportunities! David's presentation will be live streamed on the OLC Facebook page or register for the Zoom call using the button below.

Our next Mentoring Workshop will be on March 19, 2025 (3rd Wednesday) at 8:30 PM ET. Mark your calendar for an exciting session.

When: Wednesday, March 19th, 8:30 PM (ET)

Topic: Investing in Crypto with David Doss

How: Register for the [Zoom](#) meeting. You will receive a confirmation and a link to join the meeting.

Contact Chris McCarron, Membership Training & Education Chair if you have any feedback or ideas for future workshops.

David Doss is an advisor and fund manager with over 15 years of experience in marketing, growth, and investing, leading teams and managing large budgets across industries like technology and cryptocurrency. He holds an MBA and currently chairs CKC.Studio and manages CKC.Fund.

Chris McCarron, Membership Training & Education Chair

Call for Presenters

Have you presented an educational topic to your club?

Would you like to share your investment tips or insights?

Have you conducted research on a topic of your interest and are eager to share your findings?

If so, we'd love to hear from you!

Contact [Chris McCarron](#) for more details.

Education Tip of the Month

BetterInvesting keeps a list of all the recent updates to the Online Stock Tools–

<https://www.betterinvesting.org/find-great-stocks/online-tools/updates>.

2024-2025 OLC Portfolio Challenge

January 31, 2025

A January Effect Occurs Again

The January effect is the supposed seasonal tendency for stocks to rise in the first month of the year. It is often attributed to investors selling losing stocks in December for tax-loss harvesting and repurchasing them after the New Year. January 2025 was in line with this seasonal pattern, being a positive month for investors. The S & P rose 2.4 percent, while the average increase in the Portfolio Contest entry was 1.4%.

Looking just within the Portfolio Contest entrants, the rankings, led by the Two Rivers Investment Group, were relatively stable. The most noteworthy change was in Jonathan Schrag's portfolio climbing up five ranks. All seven of his holdings, led by a 12% gain in Wells-Fargo, increased. The portfolio-held stocks that gained the most (17-18%) in January were Meta (former Facebook), Camtek (developer and manufacturer of high-end inspection and metrology equipment for the semiconductor industry), and CrowdStrike Holdings (Cybersecurity). All three are in the computer technology world, broadly defined. Over the life of the 2024-25 contest, the average contestant's portfolio remains up more than the S & P 500 (8.4% vs 6.9%).

Contestants will have an opportunity to change holdings with the change date being February 14.

You can see information about the portfolios by clicking on [2024-2025 Online Portfolio Contest](#). For other questions or comments, please email contact@online.betterinvesting.net with “Portfolio Contest” in the subject line. *Dan Perlman, Portfolio Contest Chair*

Membership and Club Visits

Exciting News for Club Visits!

Our club visit schedule is filling up fast, and we're booking now for 2025! Don't miss out—contact us today to schedule your FREE virtual visit. ALL clubs are eligible for a visit.

Why Schedule a Club Visit?

Whether through Zoom or another virtual platform, we're excited to connect with you. The best part? There's no cost involved, and the insights and energy you'll gain are truly priceless.

Customize Your Experience

Each club is unique, and our dedicated volunteers are here to tailor the presentation to fit your specific needs. From free training sessions to engaging discussions, we've got you covered.

Topics We Offer:

- Club Portfolio Discussion
- Finding Stocks to Study
- SSG Stock Study Tips
- First Cut Tips
- How to Research a Company
- Club Operations
- Conducting Effective Meetings
- Q&A Session on BetterInvesting

Introducing Our "Coffee Chat" Visit

Join us for a casual, friendly "Coffee Chat" visit where we answer questions from members in a relaxed atmosphere. It's a great way to get personalized advice and insights.

Let's Make It Happen!

We're here to provide the knowledge and tools your club needs to thrive. Reach out today and let's make your club visit an unforgettable experience!

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

Volunteers

Interested in volunteering with our chapter?

Not sure how to get started? Training is provided and your contribution can be as large or small as your time permits. Please contact us at membership@online.betterinvesting.net for more information.

For all our current volunteers – THANK YOU! Our Chapter runs on your valuable contribution.

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, February 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, February 17 at 8:30 PM ET

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.

February 2025

Editor: Sriram Madabhushi

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