

*BetterInvesting's™ Online Chapter  
Monthly Bulletin*

January 2023

Volume 2, Issue 1

*What's New?*

Welcome	Message from the Presidium
Announcement	January Workshop on: Common or Preferred Stock.
Membership and Satellites News	Latest Membership and Satellite News
Portfolio Challenge	OLC Annual Portfolio Contest 2022-2023
<a href="#">Recurring Quick Access Links</a>	

OLC Webpage: [Online Chapter | Better Investing](#)

**Presidents Committee Update**

Happy New Year! We are working hard on making the Online Chapter an easy to use and easy to access resource for our members. Our goal is to provide you with exemplary member support. You may notice some changes so let us know if they are working for you and if there are additional improvements that you would like to see.

Wishing you a successful investment journey!

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

**OLC Mentoring Workshop: November Recap and January Program**

The November OLC Mentoring Workshop was a great success. **Craig Braemer**, a long-time investor and a 30-year BetterInvesting (BI) member, presented “**A Dividend Growth Strategy.**”

Next up: **Common or Preferred Stock** on January 18<sup>th</sup>, 8:30 PM ET

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

**Recordings** of past open forum sessions are about halfway down on the [chapter's webpage.](#)

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

## OLC Portfolio 2022-2023 Contest

Since December 11th, the drafting of the last report on the Portfolio Contest, neither the market nor the Contest portfolios changed much. The average portfolio was up approximately 1 percent, the S & P 500 was down just under a half of a percent. This was the third month in a row that the Portfolios marginally beat the S & P 500. In terms of standings, the Yankee Model Club, the leading group in the earlier Pilot Contest, is again topped ranked with a new portfolio (ZYXI, MCFT, EDUC, DDOG). Zynex (ZYXI), a medical device manufacturer, is their leading stock, up 85% since the beginning of the contest. Netflix, held by the Emanon Investment Club, has been the second-best performing stock, up 47%. Elon Musk's Tesla is the poorest performing of the large cap stocks.

### OLC 2022-23 Portfolio Contest : Entrants' Standings

<i>Club</i>	<i>Initial Value</i>	<i>1/18/2023 SUM of Value Now</i>
Yuval Goldberg	\$100,000.00	\$92,076.17
Yankee Model Club	\$100,000.00	\$116,919.72
Two Rivers Investment Group	\$100,000.00	\$106,057.14
timur yildiz	\$100,000.00	\$98,231.64
Prairie Investment Partnership	\$100,000.00	\$112,212.52
Patsy Freeman	\$100,000.00	\$103,360.58
Mihai Buciu	\$100,000.00	\$95,234.76
Marie Bartolotta	\$100,000.00	\$87,844.12
Let It Ride Investors of Carson Valley	\$100,000.00	\$109,194.30
Laurie Mulligan	\$100,000.00	\$88,524.86
Kaye Light	\$100,000.00	\$102,561.64
ISABEL S CARRILLO	\$100,000.00	\$93,996.99
Franklin W. Fenton	\$100,000.00	\$87,116.08
Financial Escape Investment Club	\$100,000.00	\$107,319.69
Emanon Investment Club	\$100,000.00	\$108,837.56
Cincinnati Model Investment Club	\$100,000.00	\$91,835.94
Carolyn Odio	\$100,000.00	\$108,118.73
Bob Houle	\$100,000.00	\$105,895.62
Barbara J Drake	\$100,000.00	\$97,270.75
<b>Grand Total</b>	<b>\$1,900,000.00</b>	<b>\$1,912,608.82</b>

Entrants can change their holdings once during the contest. The close of the market on Friday, February 17 will be the deadline for submitting requests for changes and prices at that time will be used as the share values for the changes made. Entrants can sell all or part of specific holdings to buy new holdings (max portfolio size = 7 holdings) or add to existing holdings. The amount available for reinvestment will be the amount received from sales.

This year's contest will run through July 31, 2023. Anytime during this period the entrants, their portfolios, and their standings can be viewed by clicking on Portfolio Summary and Portfolio Details. Periodic updates on the progress of the Portfolios will be published in our monthly Bulletins.

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

*Dan Perlman, [Portfolio Contest Chair](#)*

## Membership and Satellites Operations

The Online Chapter has 71 clubs with Milestone anniversaries in 2023. We will be contacting these clubs for volunteers to present anniversary certificates in the upcoming months.

Why wait until a milestone anniversary for a club visit?

- Would you like a guest speaker at an upcoming meeting?
- Could your club benefit from a question-and-answer session with someone who's "been there"?
- Could your club use some help with any of these topics?

Contact us at [membership@online.betterinvesting.net](mailto:membership@online.betterinvesting.net) to arrange a volunteer visit – virtual or in person for your club today or visit the Investment Club Support section of our website.

Is your club a newer club that might benefit from a mentor and/or club visit? The Online Chapter has volunteers ready to assist your club.

*Susanne Koster, [Director of Satellite Operations](#)*

## 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, December 10 at 11AM ET

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

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: Monday, December 12 at 8:30PM ET

**[South Texas Model Stock Investing Club](#)**

- Meets the 2nd Wednesday of each month
- Next Meeting: Wednesday December 14 at 6:30 CT
- **[Join the meeting](#)** at the scheduled time via Zoom

**January, 2023**

**Editor: Sriram Madabhushi**

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