



Mid-Michigan Chapter Fall Newsletter 2023

BI Anniversary Clubs

Congratulations to these clubs who celebrated 5-year incremental anniversaries this year!

- Investments Ltd. Investment Club, 65 years.
- Women’s Investing Network of Metro Detroit, 45 years
- CHR Group, 40 years
- Black Monday Investment Club, 35 years
- Grove Group, 35 years
- Famco Investment Club, 30 years
- Wolves Investment Club, 30 years
- Futurevest Investment Club, 25 years
- Antique Warehouse, 25 years
- NAIC Mid-Michigan Model Investment Club, 20 years
- BI Baker Model Investment Club, 10 years
- West Michigan Model Investment Club, 5 years

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Club Visits

Clubs from throughout the Mid-Michigan Chapter area are encouraged to request a club visit from one of our chapter directors. Our directors are happy to discuss club operations, your portfolio in general or a topic of your choice. Visits are absolutely free. We encourage our members, especially our new clubs, to ask for club visits by contacting Ken Kavula at clubcontact@midmi.betterinvesting.net

Stockpickers’ Follow-Up Webinar

Our annual Stockpickers Event will be held virtually this year on November 8 at 8:00PM. The event will feature a complete review of the 2022-23 Stockpickers Contest with a look at the top portfolios, a list of the best performing stocks in the various entries, and a look at the worst performers as well. Special attention will be given to the Your Choice portfolio which is made up of the most frequently picked stocks in the entries. It has performed amazingly well this year, and a lot might be learned from checking the stocks that make up the portfolio.

After we present the prizes to the winning entries and recognize the anniversary clubs, we will conduct a class. Traditionally, Mark Robertson has been our guest at these events and this year is no exception. Mark will be joined by Ken Kavula as they explore stock ideas, talk about finding great candidates, and answer questions about clubs, investing and portfolio management from our audience. Register for this webinar at <https://www.betterinvesting.org/chapters/mid-michigan/>

Stockpickers Contest

Our 2022-23 Stockpickers Contest demonstrates the power of investing in common stocks. The contest, which began November 1, 2022, and continues through October 31, 2023, has had a few different club entries in first place during the past year. As of September 29, 2023, here are the top five entries:

BI Baker Model Investment Club	Grand Blanc	\$150,492
Mark's Manifest	Rochester Hills	\$148,248
Big Rapids Investment Club	Big Rapids	\$147,157
KoolKids	Traverse City	\$141,686
Synergy Investment Club	Saginaw	\$140,585

With one more month of investing to go, you can see it's anybody's game!

We would like everyone to have a chance to participate in next year's contest. It's so easy to do and takes only a few minutes to send your entry. First, have your club or a subset of your club choose 5 to 10 stocks they feel will do well during the next year. Decide how to allocate your \$100,000 between the stocks chosen and then send that list along with the club's name and the name, email, and phone number of a contact for the club to kkavula1@comcast.net.

Many of our entrants tell us they make their own choices from their own portfolios, picking the 8 or 10 stocks with the most potential from those they follow or would like to own. Other clubs simply ask each member for one idea and then send in that list. No matter how you choose, you will be part of an entertaining experience, and you will get to see what other clubs in our area think are good choices for next year. We will make sure you can access the website which keeps track of the standings day by day, and you can report to your club how your entry stacks up against the competition.

This year we will be starting the new contest on April 1, 2024, and letting it run through March 31, 2025. Our annual Stockpickers' event will move to mid-April or early May of 2025. We hope that this is an opportune time to get together, either in person or virtually. And we sincerely hope you will take the time during the coming month of March to send us an entry for the 2024-25 Stockpickers Contest. Don't worry! We will remind you a few times before the entries are due.

Planning Ahead

The programs below will require preregistration. The programs' registration information will be available in our e-newsletter and at the BI Mid-Michigan website <https://www.betterinvesting.org/chapters/mid-michigan/local-events>

If you are signed up for the Mid-Michigan Chapter e-mail notices, you will get a notice each month with the preregistration information. (see page 3 to sign up for the e-newsletters.)

January 3 and 4. Getting Started webinars—a series of 4-5 webinars aimed at new investors and investors looking to review basic SSG concepts. More information about these webinars will be available on our website at <https://www.betterinvesting.org/chapters/mid-michigan/local-events> as the events draw nearer.

April 1, 2024 The new Stockpickers' Contest will begin and run through March 31, 2025.

The Roundtable Monthly Webinars

The Mid-Michigan Roundtable is a long-running program sponsored by our Chapter to inform and entertain the members in Mid-Michigan. We open our doors to the entire country, and once a month the Knights and Damsels of the Roundtable present actionable stock ideas for the audience to consider. Each month after the presentations are made, and \$1000 in virtual currency is invested in each, the audience votes on the idea they feel is strongest, and an extra \$1000 in virtual currency is invested in that stock.

Mid-Michigan has been running this program for more than 13 years and has kept track of the results of our ideas over that entire time. The results are impressive. The tracking portfolio shows an (annualized compounded return of between 15% and 16.5%, depending on the month. The relative return, meaning the amount that the portfolio beats the market, has hovered between 4.5% and 6%.

The program is absolutely free to our members, their friends and families. Simply register at <https://www.betterinvesting.org/chapters/mid-michigan/local-events>

What is a Model Club?

Model clubs are open for observation by the public. They are a good place to see how an investment club can be operated using BetterInvesting principles.

Current information about each club meeting will be posted to the BetterInvesting website <https://www.betterinvesting.org/chapters/mid-michigan/local-events>

BI Baker Model Club, 2nd Tuesday, 6 pm. Grand Blanc/McFarlen Library, 515 Perry Road, Grand Blanc, MI 48439 and online. To attend the meeting online, go to joingotomeeting.com at the meeting start time and enter the following meeting ID 700-066-922.

BI Brighton Model Club, 1st Saturday of the month, 10 am. These meetings are currently online only. Contact president@semich.betterinvesting.net

CARMIC, 2nd Wednesday of the month, except December, 6pm. GreenStone Farm Credit Services, Suite 100, 3515 West Rd, East Lansing, MI 48823. Please ring bell at door. To attend online, please contact modelclubcontact@midmi.betterinvesting.net

Elk Rapids Port of Value Model Investment Club. 1st Tuesday of the month, 10 am. The meetings are currently being held online. To attend the meeting online, go to joingotomeeting.com at the meeting start time and enter the following meeting ID: 207-246-653.

Mid-Michigan Model Club, 3rd Monday of the month, 5:15-6:50pm. Bridgeport Public Library, 3399 Williamson Rd., Bridgeport 48601 and online. Registration is not required. To attend the meeting online, go to joingotomeeting.com at the meeting start time and enter the following meeting ID 733-949-858.

West Michigan Model Club, last Monday of the month except May, July and December. Meetings are held online or in person. For address or online information, email westmichiganmodelclubcontact@midmi.betterinvesting.net (put West Michigan Model Investment Club in the Subject line).

Not getting our e-newsletters?

Go to the BetterInvesting sign in page. Sign in and click on 'My Account', "E-mail Preferences", then click on "Local Chapter News and Events" and save.



DATES TO REMEMBER

November 8, 2023, 8 pm, Stockpickers' Contest meeting

April 1, 2024, Stockpickers' Contest for 2024-5 begins

BI's Investment Club Connect

With Investment Club Connect, it's now easier than ever for clubs to find like-minded members who are interested in joining an investment club.

Investment Club Connect is a new program designed to help individuals and investment clubs connect seamlessly. In the past, many individual investors have expressed a desire to join existing investment clubs, while clubs have struggled to find new members when someone leaves.

There's no obligation for either party.

This service is entirely free for BetterInvesting members!

For more information and complete description of the program, go to <https://www.betterinvesting.org/members/investment-clubs/club-connect>

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