



Chapter News

July 2022

President's Message (by Brent Campbell):

Welcome to the July newsletter for the North Florida Chapter of Better investing! We hope your summer is going well and you are continuing to refine your portfolio and look for those hidden stock gems. We have some wonderful insights in this newsletter from several of our members – we encourage you to dig in. Also, make sure to join us at the annual online meeting for the Chapter in September. There is more information on the meeting below and, as always, please make sure to join us on the first Monday of the month at the Model Club meeting and the first Tuesday Training Workshop. Both offerings are tremendous opportunities to learn more and interact with your fellow investors--they are consistently some of the best training sessions available anywhere. We look forward to seeing you online and please let us know if we can do anything to help you learn and take advantage of your membership in Better Investing.

North Florida Chapter Annual Membership Meeting (by Robin Ware):

September 1, 2022 at 7 PM EDT (online, register [here](#))

Join us for our best meeting of the year! Mark your calendars to join us for the North Florida Chapter Annual Membership Meeting where we will vote in our new directors, celebrate our anniversary clubs, share how you can help the North Florida Chapter by volunteering, and learn about Small-Cap Stock Investing:

Tips and Tricks for Small-Cap Stock Investing

Speaker: Doug Gerlach is the President of ICLUBcentral Inc. and leads the development of tools for investors including EquityResearchService.com, StockCentral.com, myICLUB.com, and MyStockProspector.com. Doug is also Editor-in-Chief of ICLUBcentral's stock investing newsletters, the *Investor Advisory Service*, and the *SmallCap Informer* (which he also founded).

Description: BetterInvesting recommends that individuals and clubs diversify their portfolios to include small and midsized companies, but many investors find it challenging to identify smaller companies that fit BI's criteria. As founder and editor of the *SmallCap Informer* newsletter, Doug will provide the basics of his approach for researching and analyzing small company stocks, along with a few small company ideas for your or your club's portfolio.

2022 Dream Portfolio Contest Update (Jim Gallagher):

Thanks to all of you for participating in the 2022 NFC Dream Portfolio Contest. Congratulations to the following clubs and Individuals for leading the contest through July 21st. Wow, the market mayhem continues!

Leaderboard:

Investment Clubs

Space Coast Model Investment Club--Loss of 8.21%

Venice Sharks Investment Club--Loss of 10.67%

Individuals

Bob Houle--Gain of 0.17%

Alice Tenney--Gain of 0.02%

Still a long way to go so everyone is still in it. Up-to-the-minute results are available [here](#)

Clubs only have 9 stocks in the Black. Best performing stocks are Ollies (OLLI) up about 43% and Sharps (SMED) up about 35%.

Individuals have 19 stocks in the Black. The best performing stocks are OSH up about 56% and IMXI up about 50%.

2023 Portfolio Contest: We are changing things up for 2023. We will only have a portfolio contest for clubs. We are finalizing the rules but basically, the entries will be based on actual club portfolios. We will not publicly display dollar values of the contestants' portfolios but rather just the percentages that each holding represents in the portfolio including % cash. The winners will be based on the percentage gain. To keep things simple we will not allow changes this year. The entry form for the contest will be published soon. We are looking to start the contest in September with portfolio information as of August 31st.

BINC Comments:

Phil Crocker: Some random thoughts from BINC 2022...

I always enjoy seeing old acquaintances from past years and meeting new friends. This year was special as Dan Harter and I got to meet two of our newer Directors face to face--Robin Ware and Thomas Brooks (our Chapter holds all our meetings online). It is always nice to put a face to the name and spend quality networking time in a great environment.

Thursday was a day of Volunteer training with breakout sessions and meetings with the other Chapters from the South Region. Friday and Saturday were filled with hourly classes with great instructors—it is always tough to pick only one each hour. On Friday afternoon, we got to spend

some time speaking with several Corporate Sponsors and seeing some of the new features in the SSGPlus software at the BetterInvesting Booth. SSGPlus has come a long way as a stock evaluation and research tool.

One of my favorite parts of BINC is the "Post Meeting Analysis" each evening (maybe with a cold beverage of choice) gleaned "stock ideas" from other attendees. I always leave BINC feeling "Re-energized" and wanting to continue spreading the benefits of BI and long-term investing.

Thomas Brooks: BINC 2022 was my first time attending the event. I always enjoy live training and learning sessions. The guest speakers provided a wealth of information and were very entertaining. Ralph Acampora provided one of the most impactful sessions on Technical Fusion (combining fundamental and technical analysis). I would encourage all members to attend at least one BINC and bring the knowledge back to share with their club partners and for their own personal benefit.

Manifest Investing (by Dan Harter):

Manifest Investing is a subscription service with some very nice screening features which might help you find your next great stock. Mark Robertson, founder and managing partner of Manifest Investing, provided an overview of the website at the North Florida Chapter Tuesday Training Workshop (TTW) on July 5th, 2022.

In addition to the screening tools, Mark also covered the Dashboards feature which allows you to review your portfolio to determine the quality and projected annual return (and other metrics) for your existing holdings. You can also play a "what if" scenario with your portfolio to see how changes will affect your future potential returns.

Rather than having me describe Mark's presentation, you can view the recording of the session [here](#), or sign up for all future TTW sessions [here](#).

North Florida Chapter Volunteers Celebrate Clubs (by Robin Ware):

Congratulations to the following clubs who stay the course and demonstrate what long-term investing is all about:

Women Taking Stock Investment Club--9 members celebrated their 25th anniversary June 18th. The club reminisced about how they formed and what the friendships have meant to them over the years. NFC volunteers provided a portfolio tune-up by preparing SSGs, reports, and a presentation. All club members and NFC volunteers were engaged in a lively discussion and everyone benefited from fantastic learning. The club visit lasted 2 hours and was filled with great questions and ideas. Thank you, Women Taking Stock for your generous donation to the North Florida Chapter.

Rags to Riches Investment Club--11 members celebrated their 20th anniversary June 27th. The secrets to their 20 years of success are recruiting smart women, embracing new ways of learning, and willingness to be flexible. NFC volunteers prepared SSGs, reports and a presentation to drive discussion for a Rags to Riches portfolio tune-up. Members were very open to new ideas and appreciative of an outside look into their portfolio.

Beanstalk Investment Club of Miami--5 members celebrated their 30th anniversary July 9. The club lost and found some members over the years but there are 6 original members that continue a great friendship and investment strategy using BI tools. The club asked for a myICLUB presentation and were very pleased with new ideas shared by NFC volunteers.

North Florida Chapter volunteers take pride in supporting chapter members. We provide training on a variety of investing tools. Please let us know if you have any questions or would like a virtual or in-person club visit by contacting us at: contact@northflorida.betterinvesting.net.

Upcoming Chapter Events:

If you'd like to attend one of the chapter's online sessions you'll need to register to get your own login link. You can do that by clicking on the activity of interest below:

Register [here](#) to attend future **Space Coast Model Investment Club (SCMIC) meetings** - 1st MONDAY each month at 7:30 pm.

Register [here](#) to attend future **Training Workshops** - 1st TUESDAY each month at 7:30 pm. The current series is **SSG Basics**.

Register [here](#) to attend future **North Florida Board of Directors** meetings--1st Thursday each month at 7:30 pm.

We also have a **chapter training site** that you can use to expand your investing knowledge at: [BINFC](#)

Ben Shuler, Newsletter Editor
contact@northflorida.betterinvesting.net