

# BetterInvesting's™ Online Chapter Monthly Bulletin

August 2023

Volume 2, Issue 8

## What's New?

OLC Annual Meeting	Doug Gerlach - Stocks in the "Maybe Zone" and Online Chapter Annual Meeting
OLC Mentoring Workshop	July Workshop on: Crypto and OTC - Recap
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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 July Open Forum Workshop was a great success with Bryon Wolfe, CFOAF, sharing his experience with a mistake that many clubs make: not selling stocks. He gave an excellent presentation about considering Crypto and OTC as part of an investment plan. His conversational discussion of the challenges and opportunities of Crypto and OTC was well received and answered many questions of the BetterInvestors. If you missed the Workshop, catch the recording on YouTube channel: [BIOLC](#)

Stay tuned for the September's Mentoring Workshop, on the 20th (third Wednesday) at 8:30 PM Eastern.

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.

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

## Membership and Club Visits

Congratulations to the 45 clubs in the Online Chapter celebrating milestone anniversaries. We celebrated with 17 clubs and 8 more clubs scheduled to visit to present anniversary certificates. Would your club like a visit?

Club visits are 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 – usually we 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 visit may be tailored to your club. The visit is a chat among colleagues. The volunteer shares how their clubs operate. Many clubs we visited enjoy a short presentation on researching companies or a review of Stock Selection Guide – or an introduction to how to begin. There are new, rich features recently added. I have done a review for my club – the session enhanced their understanding and usability of the tools.

As the Chapter volunteers, we are here to support you – the BetterInvesting Online Chapter members. Your club visit is tailored to your club.

And – our club visits have become so popular we are actively seeking volunteers. Training will be provided. Please contact us.

Visit our [Chapter Website](#) for more details or email [membership@online.betterinvesting.net](mailto: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](mailto:contact@online.betterinvesting.net) with “Portfolio Contest” in the subject line

## OLC Portfolio 2022-2023 Contest

Congratulations to all participants in the 2022-23 OLC Portfolio Contest. In the last three months, Yuval Goldberg and Marie Bartolotta have vied for top honors. Each of their portfolios has gained over 45% since the September 1, 2022 start of the contest. Not only have their portfolios performed in a stellar fashion, overall the average portfolio has performed very well, gaining 21.8 per cent. In the same period the S & P 500 gained just under 15 percent. Beating the key S & P index by nearly 7 percent is terrific performance. My compliments to the contestants and the BI approach. The entrants, their portfolios, and their standings can be viewed by clicking on [Portfolio Summary](#) and [Portfolio Details](#).

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

	7/31/2023	
<i>Club</i>	Initial Investment	Current Value
Yuval Goldberg	\$100,000	154,529.59
Marie Bartolotta	\$100,000	147,945.58
Emanon Investment Club	\$100,000	140,419.46
Mihai Buciu	\$100,000	140,119.02
Patsy Freeman	\$100,000	136,645.40
Laurie Mulligan	\$100,000	135,741.48
Kaye Light	\$100,000	132,268.09
Financial Escape Investment Club	\$100,000	129,685.90
Bob Houle	\$100,000	128,478.44
Let It Ride Investors of Carson Valley	\$100,000	127,332.65
Two Rivers Investment Group	\$100,000	122,292.05
Prairie Investment Partnership	\$100,000	120,580.36
Barbara J Drake	\$100,000	119,328.85
Cincinnati Model Investment Club	\$100,000	108,496.57
Yankee Model Club	\$100,000	100,942.44
ISABEL S CARRILLO	\$100,000	98,299.81
Franklin W. Fenton	\$100,000	95,196.55
Carolyn Odio	\$100,000	93,765.89
timur yildiz	\$100,000	90,844.19
<b>Grand Total</b>	<b>\$1,900,000</b>	<b>2,322,912.32</b>

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](mailto: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, August 12** 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, August 21** at 8:30 PM ET

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Editor: Sriram Madabhushi

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