

*BetterInvesting's™ Online Chapter  
Monthly Bulletin*

December 2022

Volume 1, Issue 11

*What's New?*

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
Model Investment Club Meetings	Meeting and Registration Information
<a href="#">Recurring Quick Access Links</a>	

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

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

We will kick-off the new year with an exciting presentation and discussion for our Mentoring Workshop. **Michael Allison** will be our guest to present the introductory presentation.

At the end of 2021, Michael “retired” after 33 years in the investment management industry, the last nearly 22 of them at Eaton Vance in Boston, where he served as a global equity portfolio manager and Director of Equity Strategy Implementation. With his partners and teammates, they built a multi-billion-dollar, market share leading global equity option income franchise. In 2022, he founded New Lantern Advisors so that he could more directly serve a select group of clients, as well as help fellow advisors serve their own clients.

Mark your calendar: **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 November 13<sup>th</sup>, the drafting of the last report on the Portfolio Contest, neither the market nor the Contest portfolios changed much. Both were slightly down, the S & P 500 slightly more than the Contest portfolios, 1.47 percent vs. 1.31 percent. 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 49% since the beginning of the contest. Netflix, held by the Emanon Investment Club, has been the second best performing stock, up 43%.

		As of 12/11/2022
<i>Club</i>	<i>Initial Value</i>	<i>SUM of Value Now</i>
Yuval Goldberg	\$100,000.00	\$89,747.53
Yankee Model Club	\$100,000.00	\$108,124.36
Two Rivers Investment Group	\$100,000.00	\$104,089.31
Timur yildiz	\$100,000.00	\$94,707.44
Prairie Investment Partnership	\$100,000.00	\$104,523.60
Patsy Freeman	\$100,000.00	\$99,559.05
Mihai Buciu	\$100,000.00	\$94,861.73
Marie Bartolotta	\$100,000.00	\$92,283.75
Let It Ride Investors of Carson Valley	\$100,000.00	\$107,361.85
Laurie Mulligan	\$100,000.00	\$87,432.12
Kaye Light	\$100,000.00	\$94,718.08
SABEL S CARRILLO	\$100,000.00	\$92,735.61
Franklin W. Fenton	\$100,000.00	\$84,114.76
Financial Escape Investment Club	\$100,000.00	\$107,098.53
Emanon Investment Club	\$100,000.00	\$103,340.67
Cincinnati Model Investment Club	\$100,000.00	\$86,346.79
Carolyn Odio	\$100,000.00	\$103,516.22
Bob Houle	\$100,000.00	\$98,572.82
Barbara J Drake	\$100,000.00	\$97,429.63
<b>Grand Total</b>	<b>\$1,900,000.00</b>	<b>\$1,850,563.85</b>

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](#)

## 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, January 14 at 11AM ET

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

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: Monday, January 19 at 8:30PM ET

### [South Texas Model Stock Investing Club - JOIN](#)

- Meets the 2nd Wednesday of each month
- Next Meeting: Wednesday January 13 at 6:30 CT
- [Join the meeting](#) at the scheduled time via Zoom

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