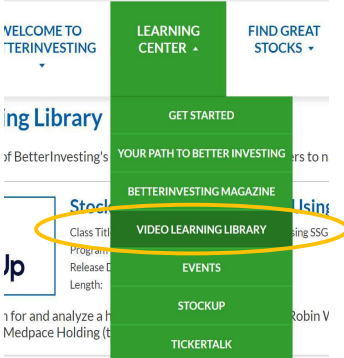


B
1

To Learn More On Portfolio Management

Here are some videos from the BI library that might help

- Special Programs - BetterInvesting Portfolio Reports, Bite of BINC. 5/18/23. Besty Wills.
- Investment Clubs - The Complete Guide to Portfolio Management for Investment Clubs. 10/14/2022. Doug Gerlach.
- StockUp - Use PERT to Perk Up Your Portfolio. 6/16/22. Suzi Artzberger.
- StockUp - Trim or Sell? Which Is Better for Your Portfolio? 11/4/21. Craig Braemer.
- Intro To The SSG - Selecting the Best Companies. 3/17/21. Ken Kavula and Ann Cuneaz.
- StockUp – Score a Portfolio Touchdown Play Defense and Offense. 2/6/2019. Nick Stratigos.
- StockUp - The PERT Report and Your Portfolio Health. 5/2/18. Chris Kirsop.
- Buy The Best - Sectors, Industries and Your Portfolio. 11/17/16. Ann Cuneaz and Ken Kavula.
- Club Treasurer Workshop - The Complete Guide to Portfolio Management for Investment Clubs. 3/21/12. Doug Gerlach.




Thanks to Ann Cuneaz and Ken Kavula for their work on many of these videos in addition to the name highlighted.

1

B
2

Portfolio Management Aides in myICLUB.com

(2 areas – Reports and Watch List)



Your Clubs: Stock quote:

Welcome, Russell
My Account | Logout

Home
Accounting
Reports
Watch List
Taxes
People
Voting
Discussions
File Storage
Calendar
Videos
Help

StockWatcher

- My Assigned Stocks
- Generate Report
- StockWatcher Assignments
- Club Watch List

Monthly

- Unified Report
- Valuation Statement
- Member Status

Reports & Charts

Link on main page includes a report description

My Favorite Reports Reset

<p>★ Unified Monthly Report</p> <p>Multi-page report displays current Valuation Statement, Member Status Report, and Complete Journal of all transactions since last club meeting.</p>	<p>★ Valuation Statement</p> <p>Displays consolidated club portfolio, cash value, and cash balance.</p>
<p>★ Member Status</p> <p>Displays value of club, along with cost basis and ownership of each member.</p>	<p>★ Company Size Diversification Graph</p> <p>Displays pie chart of portfolio diversification by company size.</p>

Link to generate report also in a left navigation column

2

B
3

Portfolio Reports

Portfolio

- Company Size
- Sector/Industry
- EPS Growth Rate
- Global
- Club Performance
- Portfolio Yield
- Portfolio Review
- Portfolio Offense
- Portfolio Defense
- Portfolio Summary
- Portfolio Trend
- Portfolio Gain/Loss

Portfolio Summary Report

★ 🖨️ 📄 ✉️

A quick overview of stocks that might be compelling buys or sells, using data and judgment from each StockWatcher's most recent BetterInvesting Online Tools SSG stock study. ([How do I import my SSGs?](#))

Dollar-Weighted Portfolio Averages for Portfolio

Projected Total Return: nmf	Reward/Risk Ratio: nmf	Total Value: \$590,886.32
Projected EPS Growth: nmf	Current P/E Ratio: 24.9	Relative Value: 73.6%

Values marked "nmf" cannot be calculated for companies not linked to BI Online Tools SSGs. Securities that are not common stocks or REITs are excluded from average calculations.

Ticker	Company	% Port	Price Date	Price	Curr PE	Rel Val	Tot Ret	Rwd Rsk	Buy Blw	Sell Abv	Rec
AAPL	Apple <i>(Russell Mailey, 10/20/2023)</i>	17.0	10/19/2023	175.46	29.5	146.0%	7.2	0.6	104.90	194.60	Hold
AMZN	Amazon.com Inc <i>(Russell Mailey)</i>	6.9	4/10/2023	102.17	80.5	43.0%	No SSGPlus Link Established				
ANET	Arista Networks Inc <i>(Russell Mailey, 10/20/2023)</i>	4.4	10/19/2023	191.48	35.4	129.7%	8.8	0.9	136.90	240.60	Hold

Some portfolio reports use data from an SSG linked to the BetterInvesting site

3

B
4

Graphs

Graphs

- Company Size
- Sector/Industry
- Portfolio Heatmap
- Club Assets
- Club Unit Value
- Member Ownership
- Portfolio Performance
- Security Performance
- EPS Growth Rate
- Global

Company Size Diversification Chart

Chart as of 4/10/2023 (Most recent club valuation statement).
 Exclude Cash from Percentages

Recommended stock portfolio diversification chart

4

BetterInvesting California Chapters October 22, 2023

B
5

Manage Portfolio Prospects

Watch List uses some data from a linked SSG

5

B
6

Portfolio Manager in the SSG

SSG Vertical Menu Bar

-
- Portfolio Manager
-
-
-
- Tutorials & Quick Start Guides

6