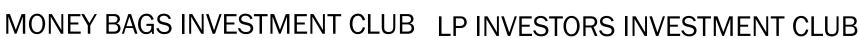
# Congratulation 2023 Certificate Clubs



## 55 Year Club





#### 40 Year Clubs

# POTLUCK INVESTORS INVESTMENT CLUB WESTAR INVESTMENT CLUB

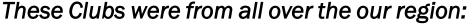
## 35 Year Clubs

FUNDI ASSOCIATES INVESTMENT CLUB
TICKER TAPE INVESTMENT CLUB

## 25 Year Clubs



WWW.WINE INVESTMENT CLUB
EDUCATORS TAKE STOCK INVESTMENT CLUB
PROFITEERS INVESTMENT CLUB
BLSH INVESTMENT GROUP
IBI-INVESTING BEFORE INGESTING INVESTMENT CLUB
WISE-WOMENS INV SCEITY ETC. INVESTMENT CLUB



Walnut Creek, Livermore, Piedmont, Pleasanton, Martinez, San Rafael, Napa, Berkeley, Richmond Redwood Valley



## **Resources for Members**

# 2024 SF Bay Area Chapter Investor Education Day

SF Chapter Directors

Craigbraemer1@gmail.com

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## **Content**

- Local Resources
  - SF Board of Directors
  - Local classes
  - Club visits
  - SF Model Club
- National Resources Education and stock ideas
  - Video library
  - First Cut Reports
  - SSG Stock Search Engine
  - Club Connect <u>NEW!</u>
- Summary

## www.betterinvesting.org/chapters/san-francisco-bay-area

Home > Chapters > San Francisco Bay Area Chapter

SF Directors - 12 Volunteers

Local classes - in-person and virtual

Club visits - let us come visit your club!

San Francisco Bay Area Chapter

**Local Events** 

Contacts

Model Investment Club

Visit-A-Club

Investment Club Support

**News & Articles** 

Volunteering



The San Francisco Bay Area Chapter of BetterInvesting welcomes you as a member of BetterInvesting. As a member of BetterInvesting you are automatically a member of your local BI chapter, at no extra cost!

The San Francisco Bay Area Chapter serves San Francisco, Oakland, Walnut Creek, San Mateo, San Rafael, Santa Rosa, Napa, Vallejo, Eureka, Menlo Park, Napa and Pleasanton. We are chartered by the National Board of BetterInvesting and staffed with volunteers, responsible for carrying out the mission of BetterInvesting; to provide investment education for local investors, help them learn the BetterInvesting investment principles and tools as well as assist investment clubs with management and accounting. We accomplish this goal with investment educational seminars, workshops, and club visits. Click here for more information.

Our Chapter's mission is to educate, mentor and support all investors: individual members, investment club members, and potential investors using BetterInvesting principles. The Chapter offers classes and special events on topics from investment basics to club accounting. You can always find the most current information about our activities by clicking on **Local Events**.



## **SF Model Club**

- Currently 17 members.
- •Wide spectrum of experience and backgrounds among members.
- Meets the second Thursday of every month.
- We meet virtually for all meetings.
  - •In 2023, we met in-person on occasion.
- Started in 2011.

## San Francisco Model Club Portfolio – 1/13/2024

	Shares Held	Cost Basis per Share	Total Cost Basis	Price per Share	Market Value	Unrealized Gain/(Loss)	Percent of Total
Adobe Systems Inc (ADBE)	22.0000	492.4882	10,834.74	596.5400	13,123.88	2,289.14	8.2%
Apple Inc (AAPL)	98.0000	22.2396	2,179.48	185.9200	18,220.17	16,040.69	11.4%
Charles Schwab Corp (SCHW)	225.0000	41.7591	9,395.80	65.2300	14,676.75	5,280.95	9.2%
Fox Factory Holding Corp (FOXF)	35.0000	93.5151	3,273.03	65.0100	2,275.35	(997.68)	1.4%
Intuitive Surgical Inc (ISRG)	32.0000	224.4731	7,183.14	363.7100	11,638.72	4,455.58	7.3%
Marine Products Cp (MPX)	555.0000	15.8046	8,771.55	10.8300	6,010.65	(2,760.90)	3.8%
Markel Group Inc (MKL)	9.0000	1,201.7322	10,815.59	1,429.8400	12,868.56	2,052.97	8.0%
MarketAxess Holdings Inc (MKTX)	25.0000	243.2212	6,080.53	268.9800	6,724.50	643.97	4.2%
Miller Industries Inc (MLR)	247.0000	33.9016	8,373.70	39.9200	9,860.24	1,486.54	6.2%
Old Dominion Freight Lines Inc (ODFL)	24.0000	93.5263	2,244.63	388.8700	9,332.88	7,088.25	5.8%
QUALYS INC (QLYS)	47.0000	101.4357	4,767.48	193.1000	9,075.70	4,308.22	5.7%
<b>Supernus Pharmaceuticals Inc</b> (SUPN)	264.0000	25.1506	6,639.77	28.2400	7,455.36	815.59	4.7%
Ulta Beauty Inc (ULTA)	25.0000	304.1672	7,604.18	482.0800	12,052.00	4,447.82	7.5%
VISA Inc (V)	44.0000	72.1971	3,176.67	264.1700	11,623.47	8,446.80	7.3%
Vertex Pharmaceutical (VRTX)	33.0000	264.2194	8,719.24	433.4000	14,302.20	5,582.96	8.9%
			100,059.53		159,240.43	59,180.90	99.4%
Cash Account			Total Cost Basis		Market Value	Unrealized Gain/(Loss)	Percent of Total
ETrade Securities LLC			953.30		953.30	0.00	0.6%
			953.30		953.30	0.00	0.6%
<b>Total Securities and Cash Accounts</b>			101,012.83		160,193.73	59,180.90	100.0%

## **National Resources**

- BetterInvesting Magazine
- Over 100 Investment Education Videos
  - TickerTalk and their bite-sized discussions
  - StockUp webinars on investment topics
- First Cut Stock Reports
- SSG Stock Search Engine Tools
- Many sources of stock ideas
- Highly awarded investment newsletters

## **National Resources**



**HOME** 

WELCOME TO BETTERINVESTING

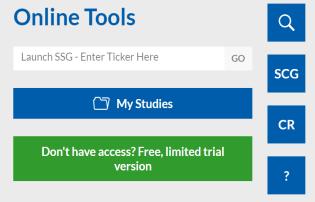


FIND GREAT STOCKS • ONLINE TOOLS •

INVESTMENT CLUBS +











# **National Video Learning Library**

#### **Stock Selection Programs**

Video series that explore all aspects of stock selection and the Stock Selection Guide (SSG).









#### Regularly Scheduled Programs

Regular programs that our members love.







Investment Clubs



Guest Speaker Series

## Stock Ideas from TickerTalk 5 in 5

2023

		Date	Clo	sing Price				
Ticker	Company Name	Mentioned	(	on Date	Size	Sector	Industry	Dividend
AMGN	Amgen	11/9/2023	\$	260.84	Large	Healthcare	Drug Manufacturers - General	3.3%
MCHP	Microchip Technology	11/9/2023	\$	71.04	Medium	Technology	Semiconductors	2.1%
KHC	Kraft Heinz	11/9/2023	\$	32.20	Large	Consumer Defensive	Packaged Foods	5.0%
RJF	Raymond James Financial	11/9/2023	\$	96.01	Large	Financial Services	Capital Markets	1.8%
TSM	Taiwan Semiconductor	11/9/2023	\$	87.80	Large	Technology	Semiconductors	2.1%
INMD	InMode	9/27/2023	\$	32.56	Small	Healthcare	Medical Devices	0.0%
IBP	Installed Building Products	9/27/2023	\$	122.20	Medium	Consumer Cyclical	Residential Construction	1.1%
RMD	ResMed	9/27/2023	\$	148.65	Medium	Healthcare	Medical Instruments & Supplies	1.3%
SNPS	Synopsys	9/27/2023	\$	446.71	Medium	Technology	Software - Infrastructure	0.0%
TSM	Taiwan Semiconductor	9/27/2023	\$	85.44	Large	Technology	Semiconductors	2.1%
PAYX	Paychex	5/25/2023	\$	108.33	Medium	Industrials	Staffing & Employment Services	3.3%
SNA	Snap-on	5/25/2023	\$	255.29	Medium	Industrials	Tools & Accessories	2.5%
FWRD	Forward Air	5/25/2023	\$	95.16	Medium	Industrials	Integrated Freight & Logistics	1.0%
CSWI	CSW Industrials	5/25/2023	\$	133.51	Small	Industrials	Specialty Industrial Machinery	0.6%
V	Visa	5/25/2023	\$	222.25	Large	Financial Services	Credit Services	0.8%
FDS	FactSet Research	4/27/2023	\$	401.40	Medium	Financial Services	Financial Data & Stock Exchanges	0.9%
MBUU	Malibu Boats	4/27/2023	\$	543.62	Medium	Consumer Cyclical	Recreational Vehicles	0.0%
TTC	Toro	4/27/2023	\$	101.17	Medium	Industrials	Tools & Accessories	1.3%
URI	United Rentals	4/27/2023	\$	375.01	Large	Industrials	Rental & Leasing Services	1.6%
KLAC	KLA	4/27/2023	\$	357.36	Medium	Technology	Semiconductor Equipment & Mate	1.5%
AVT	Avnet	3/23/2023	\$	43.29	Large	Technology	Electronics & Computer Distributio	2.7%
QLYS	Qualys	3/23/2023	\$	123.43	Small	Technology	Software - Infrastructure	0.0%
MP	MP Materials	3/23/2023	\$	27.66	Small	Basic Materials	Other Industrial Metals & Mining	0.0%
FN	Fabrinet	3/23/2023	\$	114.24	Medium	Technology	Electronic Components	0.0%
MEDP	Medpace Holdings	3/23/2023	\$	184.55	Medium	Healthcare	Diagnostics & Research	0.0%
CLFD	Clearfield	1/26/2023	\$	75.73	Small	Technology	Communication Equipment	0.0%
ANET	Arista Networks	1/26/2023	\$	121.54	Medium	Technology	Computer Hardware	0.0%
INMD	InMode	1/26/2023	\$	34.62	Small	Healthcare	Medical Devices	0.0%
LULU	Lululemon Athletica	1/26/2023	\$	309.52	Medium	Consumer Cyclical	Apparel Retail	0.0%
YETI	Yeti Holdings	1/26/2023	\$	42.94	Medium	Consumer Cyclical	Leisure	0.0%



# First Cut Stock Reports



HOME

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Home > Members > Find Great Stocks > First Cut Stock Reports

#### **First Cut Stock Reports**

First Cut Stock Reports are created by BetterInvesting members on good quality companies. These stock reports consist of a completed Stock Selection Guide (SSG) showing the judgments made by the author, and a written report sharing why each judgment was made. Use these reports to find potential investments and to compare your SSG with others from our community of investors.



The First Cut Stock Report template (DOCX) is an easy-to-use form providing a simple format to capture your rationale and thoughts about your completed SSG. Complete instructions to submit a First Cut Stock Report are included in the template.

DOWNLOAD FIRST CUT STOCK REPORT TEMPLATE

Choose 'VIEW' to see all First Cut reports for a company.

Search

# **SSGPlus Stock Search Engine Tools**



## **Investment Club Connect - New!!!**

Home > Members > Investment Clubs > Investment Club Connect

#### Introducing a New Era of Camaraderie: 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 an exciting program designed to help individuals and investment clubs connect seamlessly. Many individuals have expressed a desire to join existing investment clubs, while clubs have struggled to find new members when someone leaves.

#### Here's how it works:

- Individual members express their interest in joining a club, and we maintain a confidential list of these individuals, along with clubs open to adding new members.
- Our custom matching technology considers factors like gender, distance, and other preferences to present individual member information to existing clubs.
- 3. Clubs can then decide whether they wish to connect with a prospective new member, and if interested, they can reach out directly.
- 4. There's no obligation for either party think of it as investment club dating!
- 5. Best of all, this service is entirely free for BetterInvesting members!



REGISTER YOUR CLUB WITH INVESTMENT CLUB CONNECT

GET MATCHED WITH A CLUB



# **Summary**

- There are lots of resources and videos for investors both at the local and national level.
- Consider Club Connect to find new members.
- •See how your fellow BI members are investing with both First Cut and the SSGPlus Search Engine.
- •If you want to join your volunteer Board let us know and expand your investment knowledge.

# **Question or Comments?**

Or Time for door prizes.

Craigbraemer1@gmail.com

# **Spread the Word**

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www.betterinvesting.org/freetrial



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