

# **Congratulation 2023 Certificate Clubs**



## **55 Year Club**

MONEY BAGS INVESTMENT CLUB

## **50 Year Club**

LP INVESTORS INVESTMENT 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



***These Clubs were from all over the our region:***

*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](mailto:Craigbraemer1@gmail.com)



# Disclaimer

- The information in this presentation is for educational purposes only and is not intended to be a recommendation to purchase or sell any of the stocks, mutual funds, or other securities that may be referenced. The securities of companies referenced or featured in the seminar materials are for illustrative purposes only and are not to be considered endorsed or recommended for purchase or sale by BetterInvesting™ / National Association of Investors™. The views expressed are those of the instructors, commentators, guests and participants, as the case may be, and do not necessarily represent those of BetterInvesting. Investors should conduct their own review and analysis of any company of interest before making an investment decision.
- Securities discussed may be held by the instructors in their own personal portfolios or in those of their clients. BetterInvesting presenters and volunteers are held to a strict code of conduct that precludes benefitting financially from educational presentations or public activities via any BetterInvesting programs, events and/or educational sessions in which they participate. Any violation is strictly prohibited and should be reported to the CEO of BetterInvesting or the Director of Chapter Relations.
- This presentation may contain images of websites and products or services not endorsed by BetterInvesting. The presenter is not endorsing or promoting the use of these websites, products or services.
- **We may be recording this session for our future use.**

National Association of Investors™, BetterInvesting™ and the BetterInvesting™ Icon are trademarks/registered trademarks.  
All rights reserved. © 2022 BetterInvesting™.



# 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 – [NEW!](#)
- Summary

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

Home > Chapters > San Francisco Bay Area Chapter

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 Directors – 12 Volunteers  
Local classes – in-person and virtual  
Club visits – let us come visit your club!*



# 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
<b>Adobe Systems Inc</b> (ADBE)	22.0000	492.4882	10,834.74	596.5400	13,123.88	2,289.14	8.2%
<b>Apple Inc</b> (AAPL)	98.0000	22.2396	2,179.48	185.9200	18,220.17	16,040.69	11.4%
<b>Charles Schwab Corp</b> (SCHW)	225.0000	41.7591	9,395.80	65.2300	14,676.75	5,280.95	9.2%
<b>Fox Factory Holding Corp</b> (FOXF)	35.0000	93.5151	3,273.03	65.0100	2,275.35	(997.68)	1.4%
<b>Intuitive Surgical Inc</b> (ISRG)	32.0000	224.4731	7,183.14	363.7100	11,638.72	4,455.58	7.3%
<b>Marine Products Cp</b> (MPX)	555.0000	15.8046	8,771.55	10.8300	6,010.65	(2,760.90)	3.8%
<b>Markel Group Inc</b> (MKL)	9.0000	1,201.7322	10,815.59	1,429.8400	12,868.56	2,052.97	8.0%
<b>MarketAxess Holdings Inc</b> (MKTX)	25.0000	243.2212	6,080.53	268.9800	6,724.50	643.97	4.2%
<b>Miller Industries Inc</b> (MLR)	247.0000	33.9016	8,373.70	39.9200	9,860.24	1,486.54	6.2%
<b>Old Dominion Freight Lines Inc</b> (ODFL)	24.0000	93.5263	2,244.63	388.8700	9,332.88	7,088.25	5.8%
<b>QUALYS INC</b> (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%
<b>Ulta Beauty Inc</b> (ULTA)	25.0000	304.1672	7,604.18	482.0800	12,052.00	4,447.82	7.5%
<b>VISA Inc</b> (V)	44.0000	72.1971	3,176.67	264.1700	11,623.47	8,446.80	7.3%
<b>Vertex Pharmaceutical</b> (VRTX)	33.0000	264.2194	8,719.24	433.4000	14,302.20	5,582.96	8.9%
			<b>100,059.53</b>		<b>159,240.43</b>	<b>59,180.90</b>	<b>99.4%</b>

Cash Account	Total Cost Basis	Market Value	Unrealized Gain/(Loss)	Percent of Total
ETrade Securities LLC	953.30	953.30	0.00	0.6%
	<b>953.30</b>	<b>953.30</b>	<b>0.00</b>	<b>0.6%</b>
<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

LEARNING  
CENTER

FIND GREAT  
STOCKS

ONLINE  
TOOLS

INVESTMENT  
CLUBS

OUR  
COMMUNITY

## Online Tools

Learn about our online stock selection tools.

GET STARTED



ONLINE TOOLS



LEARNING  
CENTER



MEMBER  
BENEFITS



INVESTMENT  
CLUBS

## Online Tools

Launch SSG - Enter Ticker Here

GO

My Studies

Don't have access? Free, limited trial version



SCG

CR

?

## Most Active Stocks

The top 10 companies our members are investing in (ranked by combined buys and sells) are:

	Buy/Sell
1. <a href="#">Amazon.com (AMZN)</a>	187-24
2. <a href="#">Apple (AAPL)</a>	98-41
3. <a href="#">Microsoft (MSFT)</a>	108-27
4. <a href="#">Ford Motor (F)</a>	114-20

## First Cut Stock Reports

Every week, members from across the country share new stock studies.

VIEW ALL



# 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.



# Stock Ideas from TickerTalk 5 in 5

2023

Ticker	Company Name	Date Mentioned	Closing Price 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%

TickerTalk

# First Cut Stock Reports



[HOME](#)

[WELCOME TO  
BETTERINVESTING](#)

[LEARNING  
CENTER](#) ▾

[FIND GREAT  
STOCKS](#) ▾

[ONLINE  
TOOLS](#) ▾

[INVESTMENT  
CLUBS](#) ▾

[COMMUNITY](#)

[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.

[Company Name](#) ▾

[Ticker](#) ▾

[Sector](#) ▾

[Size](#) ▾

[Studies](#) ▾

[Latest Study](#) ▾



# SSGPlus Stock Search Engine Tools

The image displays the SSGPlus Stock Search Engine interface, divided into several key sections:

- Online Tools (Top Left):** Contains a search bar labeled "Launch SSG - Enter Ticker Here" with a "GO" button. Below it are buttons for "My Studies", a green banner for "Don't have access? Free, limited trial version", and a vertical menu with "SCG", "CR", and "?". A red circle highlights a search icon in the top right of this section, with a blue arrow pointing to the search icon in the main navigation bar.
- Main Navigation (Top Right):** Features the "BETTER INVESTING SSG PLUS" logo, a "Portfolios and Studies" section with a "New Study" button, and a "Portfolios" section with a "Show 10 entries" dropdown and an "Actions" button.
- Search for a Company (Middle Left):** A section titled "Search for a Company" with a "Search Criteria" tab. It lists various filters:
  - 9 Yr Sales Growth (%): Any
  - 9 Yr Earnings Growth (%): Any
  - 5 Yr EPS R-squared: Any
  - Size: Small, Medium, Large
  - Sector: Any
  - Dividend Yield (%): Any
  - Pre-Tax Profit Trend: Up, Even, Down
  - Return on Equity Trend: Up, Even, Down
  - Morningstar Growth Grade: Any
  - Morningstar Profit. Grade: Any
  - Morningstar Financial Health: Any
  - PE / Historical EPS Growth: Any
  - Traded Exchange: US Exchanges Only
- Predefined Screens (Middle Right):** A section titled "Predefined Screens" with buttons for:
  - Quality
  - Value
  - Quality + Dividend Yield
  - Small Company
  - Roster of Quality
- Filtered List (Bottom Middle):** A section titled "Filtered List" with buttons for:
  - Show Filtered Companies
  - Clear Filtered List
- Ticker Heat Map (Bottom Right):** A section titled "Ticker Heat Map" showing a grid of stock tickers with color-coded cells (green, yellow, red) representing performance. Tickers include FAST, GE, CBI, AL, CAT, TRN, SRCL, MMM, PCP, LUV, GWR, UNP, DE, FDS, BA, CHRW, DHR, CSX.

Additional elements include a "Logout" link in the top right and a "MyStockProspector.com" logo in the bottom middle.

# Investment Club Connect – New!!!

[Home](#) > [Members](#) > [Investment Clubs](#) > Investment Club Connect

## Introducing a New Era of Camaraderie: Investment Club Connect

### 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:

1. 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.
2. 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

During these uncertain times, everyone could use some financial security. Invite your friends, family, and co-workers to try BetterInvesting free for 90 days.

[www.betterinvesting.org/freetrial](http://www.betterinvesting.org/freetrial)



## Please Review Us on Social Media

When you give BetterInvesting a **5-star review**, it helps to further our mission by letting others know you found value in our content.

[www.BetterInvesting.org/Review](http://www.BetterInvesting.org/Review)

