

*BetterInvesting's™ Online Chapter
Monthly Bulletin*

February 2023

Volume 2, Issue 2

What's New?

Welcome	Message from the Presidium
Announcement	January Workshop on: Common or Preferred Stock.
Volunteers	Roles and Responsibilities
Membership and Satellites News	Latest Membership and Satellite News
Portfolio Challenge	OLC Annual Portfolio Contest 2022-2023
Recurring Quick Access Links	

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

Presidents Committee Update

Our goal is to provide you with exemplary member support through education programs, portfolio contests, club milestone celebrations, Club visits and mentoring. Please contact us with suggestions on adding to your member experience.

Wishing you a successful investment journey!

Presidents Committee,
Jie Eagleson, Susanne Koster, Chris McCarron, JoAnne Obata

OLC Mentoring Workshop: January Recap and March Program

Thanks to all who attended the January Open Forum Workshop. It was a landmark for the OLC EC for a number of reasons: our first workshop of 2023, our first non-BI speaker, and our first time simulcasting on Facebook!

You'll find the recording on the OLC [Facebook page](#) and the OLC [YouTube channel](#). Please like the pages and share with your friends!

Our next Open Forum Workshop is coming up March 15th. The topic is Investing in ETFs. Register for the event [here](#).

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 January 10th, the drafting of the last report on the Portfolio Contest, the market has risen nicely. For the fourth month in a row, the average value of Contest Portfolios increased even more than the S & P Index, beating it 5.9% to 3.4%. Bravo to the OLC BetterInvesting contestants and to the BetterInvesting investment philosophy. In terms of standings, the Prairie Investment Partnership jumped ahead of the Yankee Model Club to have the top valued portfolio. All six of Prairie Investment Partnership's holdings are up (Enghouse Systems, Topgolf Callaway Brands Corp, GFL Environmental, Maximus, Skechers USA, Encore Wire) since the contest began, with their top gaining stock, Maximus, up 38.6%.

Since the last report, the stocks having the greatest increase in share price were Tesla (up 66 percent) and Nvidia (up 33 percent).

<i>Club</i>	<i>Initial Value</i>	<i>2/16/2023</i>
		<i>SUM of Value Now</i>
Prairie Investment Partnership	\$100,000.00	\$122,710.28
Yankee Model Club	\$100,000.00	\$120,383.40
Emanon Investment Club	\$100,000.00	\$115,211.63
Yuval Goldberg	\$100,000.00	\$112,970.15
Two Rivers Investment Group	\$100,000.00	\$111,889.42
Bob Houle	\$100,000.00	\$111,723.13
Let It Ride Investors of Carson Valley	\$100,000.00	\$111,693.75
Financial Escape Investment Club	\$100,000.00	\$111,604.72
Patsy Freeman	\$100,000.00	\$108,745.00
Kaye Light	\$100,000.00	\$107,714.65
Carolyn Odio	\$100,000.00	\$103,380.06
Mihai Buciu	\$100,000.00	\$102,717.94
Barbara J Drake	\$100,000.00	\$101,369.88
Marie Bartolotta	\$100,000.00	\$101,283.32
Laurie Mulligan	\$100,000.00	\$100,973.03
Cincinnati Model Investment Club	\$100,000.00	\$96,961.50
timur yildiz	\$100,000.00	\$96,040.20
ISABEL S CARRILLO	\$100,000.00	\$92,297.30
Franklin W. Fenton	\$100,000.00	\$90,714.62
Grand Total	\$1,900,000.00	\$2,020,383.99

Entrants can change their holdings once during the contest. The close of the market on Friday, February 17 will be the deadline for submitting requests for changes and prices at that time will be used as the share values for the changes made. Entrants can sell all or part of specific holdings to buy new holdings (max portfolio size = 7 holdings) or add to existing holdings. The amount available for reinvestment will be the amount received from sales.

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 with "Portfolio Contest" in the subject line.

Volunteers: Roles and Responsibilities

We have over 30 active volunteers in the Online Chapter and have several vital roles in the chapter that must be filled.

On February 27 at 7:30 PM EST all Volunteers within a Satellite will meet for 30 minutes to discuss club visits and member support.

Immediately following that meeting – ALL VOLUNTEERS – will meet on February 27 at 8:00 PM EST to finalize specific volunteer roles with the chapter. Roles and responsibilities will be distributed in advance of the meeting.

Links for both meetings will be sent via email.

Finally, as a requirement of BetterInvesting, all volunteers are required to attend BetterInvesting run 4BITS trainings held during the year. The next training is conveniently being held on February 27 at 8:30 PM via GoToMeeting. Please sign up for the training [HERE](#). The Topic is Phishing & Social Engineering Awareness by Jeff Trudeau and Virtual Webinars for GTW License Holders by Carol Thein.

Membership and Satellites Operations

The Online Chapter has over 70 Clubs with milestone anniversaries this year. All clubs have been contacted via their designated club contact for a celebratory anniversary certificate presentation.

Last year we presented many anniversary certificates. Some presentations were 5 minutes long and included only a short congratulations presentation. Other clubs chose a more in depth visit that included a portfolio review and discussion. The content, duration and timing of the visit is at the club's discretion. Our volunteers are looking forward to celebrating with you.

We have volunteers available to help members reach their full investing potential. We provide mentorship to clubs and to individual members on wide range of topics:

- Forming a new club
- Club Operations
- Using The Stock Selection Guide
- Finding companies to invest in
- Club Accounting

Visit our [Chapter Website](#) for more details or email membership@online.betterinvesting.net.

Why wait until a milestone anniversary for a club visit?

- Would you like a guest speaker at an upcoming meeting?
- Could your club benefit from a question-and-answer session with someone who's "been there"?
- Could your club use some help with any of these topics?

Contact us at the above email address to arrange a volunteer visit – virtual or in person for your club today or visit the [Investment Club Support](#) section of our website.

Susanne Koster, [Director of Satellite Operations](#)

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, March 11 at 11 AM ET

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

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: Monday, March 20 at 8:30PM ET

[South Texas Model Stock Investing Club](#)

- Meets the 2nd Wednesday of each month
- Next Meeting: Wednesday March 15 at 6:30 CT
- [Join the meeting](#) at the scheduled time via Zoom

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Editor: Sriram Madabhushi

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