

BetterInvesting's™ Online Chapter Monthly Bulletin

April 2023

Volume 2, Issue 4

What's New?

Welcome	Message from the Presidium
Announcement	May Workshop on: Portfolio Checkup
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

All members of the Online Chapter are invited to attend the monthly board meeting held on the first Monday of every month. Register once and you will receive meeting reminders for all future meetings. Wishing you a successful investment journey!

[REGISTER](#)

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

OLC Mentoring Workshop: May Program

Our last Open Forum Workshop was on March 15th 8:30pm. The topic was **Investing in ETFs**. It was well received by the OLC members and a good discussion took place.

Our next Open Forum Workshop is May 17th at 8:30pm ET. The topic is **Portfolio Checkup**.

Allen Holdsworth, who has done over 100 portfolio reviews, will share examples of mistakes and best practices to improve your portfolio health. Click this [Zoom link](#) to **Register** for the meeting. You will receive a confirmation and a link to **join the meeting**.

Chris McCarron, [Membership Training & Education Chair](#)

OLC Portfolio 2022-2023 Contest

Since March 10th, the drafting of the last report on the Portfolio Contest, the average of the contests' portfolios has increased nicely, 5.3%, but one per cent less than the S & P index's 6.3%. The rank order of portfolios was fairly stable with Mihai Buciu's seven-stock entry climbing upward the most, six ranks. Mihai's portfolio—consisting of Alphabet, JD, Apple, NVIDIA, Amazon, Disney, and Merck—is weighted heavily toward faster growing and technology stocks. The stock with the greatest gain during the March 10-April 9 period was the Cincinnati Model Club's Lulu, up 22.9%.

4/9/2023		
<i>Club</i>	SUM of Investment	SUM of Value Now
Prairie Investment Partnership	\$100,000	\$119,655.90
Two Rivers Investment Group	\$100,000	\$116,609.27
Emanon Investment Club	\$100,000	\$113,055.74
Financial Escape Investment Club	\$100,000	\$111,609.77
Mihai Buciu	\$100,000	\$110,700.06
Yuval Goldberg	\$100,000	\$110,553.69
Let It Ride Investors of Carson Valley	\$100,000	\$110,172.45
Marie Bartolotta	\$100,000	\$109,916.53
Laurie Mulligan	\$100,000	\$109,587.78
Patsy Freeman	\$100,000	\$109,159.61
Barbara J Drake	\$100,000	\$108,316.66
Bob Houle	\$100,000	\$106,268.00
Kaye Light	\$100,000	\$103,955.23
Yankee Model Club	\$100,000	\$101,904.66
Carolyn Odio	\$100,000	\$93,175.89
Cincinnati Model Investment Club	\$100,000	\$91,299.35
timur yildiz	\$100,000	\$87,106.51
Franklin W. Fenton	\$100,000	\$86,541.90
ISABEL S CARRILLO	\$100,000	\$85,857.06
Grand Total	\$1,900,000	\$1,985,446.06

This year's contest will run through July 31, 2023. The entrants, their portfolios, and their standings can be viewed by clicking on [Portfolio Summary](#) and [Portfolio Details](#).

If you have any questions or suggestions please send to contact@online.betterinvesting.net with “Portfolio Contest” in the subject line.

Dan Perlman, Portfolio Contest Chair

Membership and Satellites Operations

Membership and Satellite Operations

The Online Chapter has over 45 Clubs with milestone anniversaries this year. To date, we have presented or are scheduled to present 16 clubs with Anniversary Certificates. We have a few presentations in person – and can provide in person visits if we have a local volunteer in your area.

Congratulations to the milestone anniversary clubs we have already visited:

- Downeast Investment Club
- Making Bacon
- Massapoag Investment Club
- MBAR Investment Club
- RFC Investment Club
- STC Model Club
- Women Investing Wisely

All clubs and individual members have been contacted for a celebratory anniversary certificate presentation.

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

The content, duration and timing of the visit is at the club’s discretion. Our volunteers are looking forward to celebrating you. 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.

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

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.

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

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: **Monday, April 17** at 8:30PM ET

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

- Meets the 2nd Saturday of each month
- Next Meeting: **Saturday, May 13** at 11 AM ET

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