

BetterInvesting's™ Online Chapter Monthly Bulletin

August 2024

Volume 4, Issue 8

What's New?

OLC Presidents' Message	Online Chapter Presidents' Committee Update
OLC Annual Meeting	Fifth Annual Membership Meeting
OLC Mentoring Workshop	July Mentoring Workshop - Latest updates to online tools
2024-2025 Portfolio Challenge	OLC Annual Portfolio Contest 2024-2025
Membership and Club Visits	Membership and Club Visits
Volunteers	Join us
Portfolio Challenge	OLC Annual Portfolio Contest 2023-2024
Model Investment Clubs	Model Investment Club Meetings
BI National News	Recurring Quick Access Links

Online Chapter Presidents' committee Message

How do you Navigate the News?

There has been new market volatility lately – some of the usual causes and a few new ones popping up in the last month. Analysts cite:

- The Federal Reserve is now “behind the curve” given weaker labor markets and manufacturing numbers
- Escalating Middle East Tensions
- Other Geopolitics
- The USA Presidential Election Uncertainty and turmoil
- Earnings Reports – include guidance provided by Companies.

What is your club doing to navigate the volatility? The BetterInvesting methodology is to remain invested – we are not market timers – but.....are you changing your investments? Rotating in or out of different sectors?

Don't forget – our third annual portfolio contest begins on September 1, with all virtual portfolios due by August 31. Clubs have found the contest a refreshing way to think outside the box – for stocks that will perform best in the 11 months of the contest. The cost to enter is FREE! See details on entering in this newsletter. Clubs and

Individuals are welcome to participate.

Jie Eagleson, Susanne Koster, Chris McCarron, JoAnne Obata

OLC Annual Meeting and “Trim or Sell – Which is better?” A Workshop by Craig Braemer

We are excited to announce our annual meeting and special workshop session. Mark your calendars.

When: Monday, August 5th, 8:00 PM (ET)

Chapter overview, accomplishments, goals, election of Directors, portfolio contests and a special webinar.

8:00 – 8:25 PM ET Online Chapter Annual Meeting

8:30 – 9:30 PM ET Craig Braemer CFP® CFA® – A Quick Review of Trim or Sell – Which is Better?

You have a winning stock. Should you sell your whole position or just trim it? This is a tough decision. We will explore the logic and factors of trimming a long-term holding versus selling out of a high-quality company. If the concept of trimming is new to you, learn why this approach could help your financial wealth. Come and learn more about handling this issue.

[REGISTER](#)

OLC Mentoring Workshop

Our next Mentoring Workshop will be on September 18, 2024. Mark your calendar for an exciting session.

When: Wednesday, August 18th, 8:30 PM (ET)

Topic: General Discussion and Open Forum

How: Register for the [Zoom](#) meeting. You will receive a confirmation and a link to join the meeting.

The meeting will also be simulcast on the BetterInvesting Online Chapter [Facebook](#).

Recordings of all past workshops are available on the chapter YouTube channel [here](#) and the [chapter's webpage](#) under News and Articles.

Contact [Chris McCarron](#), Membership Training & Education Chair if you have any feedback or ideas for future workshops.

[REGISTER](#)

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

2024-2025 OLC Portfolio Challenge

New Contest Coming in 2024-2025: The Chapter Directors have voted to have a third annual Portfolio Contest starting September 1st and runs through July 31, 2025.

CONTEST SUBMISSION DEADLINE: 31 August 2024

Clubs as well as individuals are invited to enter by [clicking here](#).

Please enter at least 4 but not more than 7 stock choices. Enter initial dollar amounts for each stock ensuring that the total invested equals \$100,000. For each stock, we will divide the designated dollar amount by the price per share at the beginning of the contest to determine the number of shares you have for each holding. Good luck!

If you have any questions, please submit them to contact@online.betterinvesting.net with Portfolio Contest in the header.

Membership and Club Visits

Our club visit schedule is robust. Congratulation to the club we have in the past month:

- Seaside Investment Group

Has your club set a date for a club visit? Visits are done via Zoom or other virtual meeting software.

The cost – FREE! The energy and information that comes along with the visit – priceless. Your club visit will be tailored to your club. Need help navigating the BetterInvesting Website? How to study a stock? A portfolio discussion? Club best practices?

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

Volunteers

Interested in volunteering with our chapter? Not sure how to get started? Training is provided and your contribution can be as large or small as your time permits. Please contact us at membership@online.betterinvesting.net for more information.

The next 4-BITS volunteer training will be on September 18. State tuned for more details in the upcoming Newsletters.

For all our current volunteers – THANK YOU! Our Chapter runs on your valuable contribution.

OLC Portfolio 2023-2024 Contest

July 2024: An Interesting Final Month

The 2023-24 Portfolio Contest ended with a July change in the rankings. The Financial Escape Club climbed a rank based on growth in six of its seven stocks, especially Allegion PLC (up 16%) and D H Horton (up 27%). The Emonon Club dropped a rank on small declines in most of its holdings and a sharp decline (33%) in Five Below. Five Below reported discouraging news on multiple fronts: disappointing fiscal first quarter results, a

lowered full year outlook, the departure of its CEO, and worries that Trump tariffs could be problematic. Overall, the results for the contest's September 1, 2023 to July 31, 2024 duration were that the average portfolio increased 18% (vs 21% for the S & P 500). The highest gaining two portfolios will be announced at Monday's (August 5 th) AGM. The top portfolio benefited considerably from every dollar it invested in Nvidia increasing its value to \$2.30.

You can see information about the portfolios by clicking on [Portfolio Summary](#) and/or [Portfolio Details](#). For other questions or comments, please email contact@online.betterinvesting.net with "Portfolio Contest" in the subject line.

Don't forget register for 2024-2025 Portfolio Contest

[Dan Perlman, Portfolio Contest Chair](#)

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, August 10 at 11:00 AM ET

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

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: Monday, August 19 at 8:30 PM ET

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.

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