

Link Member SSGPlus Stock Studies to Your myICLUB Club Portfolio

MYICLUB.COM INVESTMENT CLUB WEBINAR - JUNE 2024



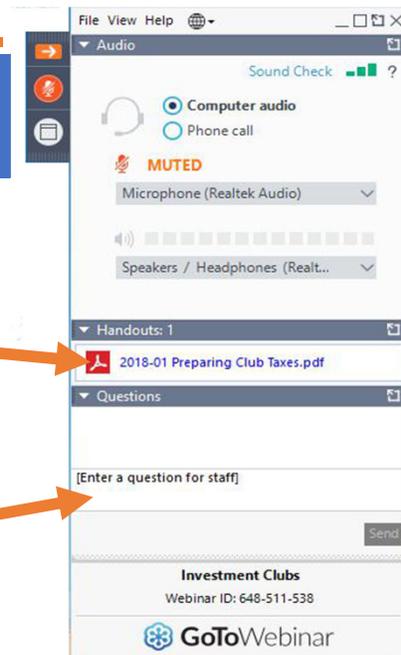
Russell Malley

Sean Pulrang

Handout & Questions

Handout in PDF format is available in Handouts tab.

Type questions in Questions box.





WHAT IS THIS MYICLUB.COM-TO-SSGPLUS LINK?

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What Is myICLUB.com-to-SSGPlus Link?



- myICLUB.com feature allows club members to link to their BetterInvesting SSGs.
- Members' SSG judgment is then used in myICLUB.com Portfolio & StockWatcher Reports.
- Objective is to provide better outlook than was previously provided via myICLUB.com default judgment.

Requirements



- All myICLUB.com clubs have this capability.
- Provides access to SSGPlus tool on BetterInvesting.org
 - If desired, is possible for single club member to manage & link all SSGPlus stock studies to their myICLUB.com.
 - Toolkit 6 stock studies cannot be linked directly.
 - Can be imported to SSGPlus account & then linked from there.

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Instructions



- Quick Start Guide (PDF) available in myICLUB.com File Storage folders.
- Includes complete instructions & descriptions of all Portfolio Reports.



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STEP I. MEMBERS MUST LINK ACCOUNTS

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Members Link SSGPlus Accounts to myICLUB



- Each club member logs into myICLUB & establishes link to personal BI account:
 - Click **My Account** at top right corner of any page on myICLUB.
 - Select **Establish BI Link** from left-hand navigation menu.
 - Enter BetterInvesting username & associated password, then click **Establish Link** button.
 - Establishing link takes a few seconds; once complete "Your ICLUB-BI link is established" will be displayed along with BI membership number.
- *Note: BI Link function is also available in myICLUB People > My Preferences.*
- This is one-time procedure.

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The screenshot shows the myICLUB website interface. At the top left is the myICLUB logo. To its right is a 'Your Clubs:' dropdown menu with 'Any I.C.' selected. Further right is a user greeting: 'Welcome, Alantis' with links for 'My Account' and 'Logout'. Below the logo is a navigation bar with 'Home' and 'Help' links. On the left side, there is a vertical menu of account management options: 'My Account Home', 'Change Username', 'Change Password', 'Change Security Question', 'Change Contact Info', 'Email Preferences', and 'Establish BI Link'. An orange arrow points to 'Establish BI Link'. The main content area is titled 'Establish BI Link' and contains a paragraph explaining that portfolio reports require data from the Stock Selection Guide, which is obtained from the BetterInvesting.org website. Below the text are two input fields: 'BI Username:' and 'BI Password:', each with a small eye icon to toggle visibility. A green 'Establish Link' button is positioned below the fields. At the bottom of the main content area, there is a link: 'Not a BetterInvesting club or BetterInvesting member? Visit BetterInvesting for information on membership for you and your club.'

This screenshot shows the same myICLUB website interface, but for a user named 'Doug'. The layout is identical to the previous screenshot, including the logo, navigation, and account management menu. The 'Establish BI Link' page content is now complete. The paragraph about the Stock Selection Guide is present. Below it, an orange arrow points to the text: 'Your ICLUB-BI link is established. Your BI # is [redacted]'. This is followed by another paragraph: 'You may now link your SSG Plus stock studies to any stock you have been assigned to watch for your club on the 'My StockWatcher Assignments' page.' Below this text is a green 'Unlink' button. The footer link remains the same: 'Not a BetterInvesting club or BetterInvesting member? Visit BetterInvesting for information on membership for you and your club.'



STEP 2: CLUB OFFICER ASSIGNS STOCKS

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Club Officer Assigns Stocks



- Club Administrator or Officer with permissions to “Create and delete ballots, and edit StockWatcher assignments” assigns each stock to member:
 - Go to **myICLUB > Reports**, then click **StockWatcher Assignments**.
 - Select assigned club member for each stock in portfolio.
 - One member can manage many stocks. Each stock can have only one StockWatcher.
 - Only stocks can have StockWatchers. Other types of securities cannot be assigned.
- “Last Generated” is date StockWatcher last created StockWatcher Report for that stock.
- Click **Submit** at the bottom to save changes!

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Security	Assigned To	SSGPlus Link Established	Last Generated
Apple (AAPL)	Doug Gerlach	Yes	1/15/24
Air Lease (AL)	Earl ZZ Alphonse	Yes	8/3/21
Century Communities (CCS)	Russell Malley	Yes	7/27/21
Church & Dwight (CHD)	Doug Gerlach	Yes	3/13/23
Darden Restaurants (DRI)	Doug Gerlach	Yes	3/13/23
Electrolux AB Class B ADR (ELUXY)	--Not Assigned--	No	N/A
Extra Space Storage (EXR)	Doug Gerlach	No	4/13/21



STEP 3: CREATE SSG WITH SSGPLUS

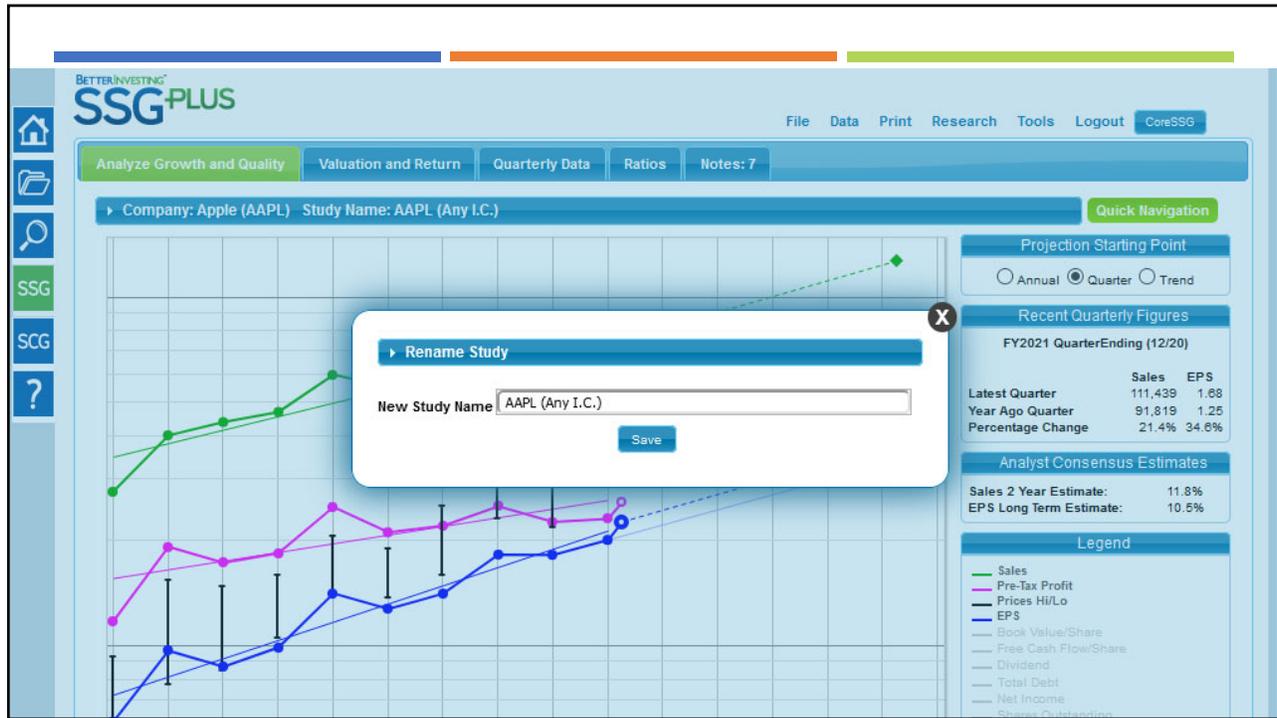
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Create SSG on SSGPlus



- If SSGPlus study already exists, this step can be skipped.
- Otherwise, members log into [BetterInvesting.org](https://www.betterinvesting.org) website & create SSG using SSGPlus.
 - We recommend changing name of study to include club name (to make it easier to identify later), especially if member has more than one study for assigned companies.
- Make sure study is complete! Studies without judgment won't fill in reports.

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STEP 4: LINK SSG TO MYICLUB.COM

Link Your SSGs to myICLUB.com



- Go to **myICLUB > Reports** & select **My Assigned Stocks**.
 - Stocks labeled “--Not Linked--” have not yet been linked to an SSGPlus study.
- Select member’s SSGPlus study to be used in myICLUB reports. Only works if member has a completed study for that ticker!
- Repeat for each assigned stock.
- Click Submit to save choices.

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Reports & Charts

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StockWatcher
My Assigned Stocks
Generate Report
StockWatcher Assignments
Club Watch List

Monthly
Unified Report
Valuation Statement
Member Status

Portfolio
Company Size
Sector/Industry
EPS Growth Rate
Global

My Favorite Reports Reset

- ★ **Valuation Statement**
Displays consolidated club portfolio, cash value, and cash balance.
- ★ **Company Size Diversification Graph**
Displays pie chart of portfolio diversification by company size.
- ★ **Club Benchmark & Performance Report**
Benchmarks club's compound annual return versus S&P 500 and other indexes.
- ★ **Portfolio Review**
Displays PERT-style early warning signals to reveal sub-par company performance.
- ★ **Member Status**
Displays value of club, along with cost basis and ownership of each member.
- ★ **Global Diversification Graph**
Displays pie chart of diversification of club portfolio by country of owned companies.
- ★ **Portfolio Summary**
Displays key indicators relating to price and valuation of holdings.
- ★ **Portfolio Heatmap**
Displays club's holdings using sizes and colors to represent current market value and gain/loss of securities since purchase.

StockWatcher & Watchlist Reports

- My Assigned Stocks**
Displays which of your SSGPlus studies are linked to which stocks. Establish or edit links to your studies.
- Club StockWatcher Assignments**
Displays which members are assigned to which stocks. Edit assigned stocks.
- My Watch List Stocks**
Displays a list of the stocks you've added into the club's watchlist.
- Club Watch List Report**
Keep track of members' ideas for future investments in club's portfolio.

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StockWatcher
 My Assigned Stocks
 Generate Report
 StockWatcher Assignments
 Club Watch List

Monthly
 Unified Report

My Assigned Stocks

You are the **StockWatcher** for the following stocks for your club. It is your responsibility to update the SSGs for each of your stocks on a regular basis (such as before each meeting) using **BetterInvesting's SSGPlus** application. The results of these SSGs are then used to update the club's **myICLUB.com Portfolio and StockWatcher Reports**. ([How do I import my SSGs?](#))

Security	BI Study	Study Last Updated	StockWatcher Generated	Actions
Apple (AAPL)	AAPL (Any I.C.)	7/12/23	1/15/24	Go to SSGPlus Generate StockWatcher
Church & Dwight (CHD)	--Not Linked-- AAPL 8/17/21 AAPL (Any I.C.) AAPL 6/14/21		3/13/23	Go to SSGPlus Generate StockWatcher
Darden Restaurants (DRI)	DRI (Any I.C.)	3/13/23	3/13/23	Go to SSGPlus Generate StockWatcher

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See Who Is Assigned to Each Stock

- To see current assignments, go to **myICLUB > Reports > Club StockWatcher Assignments**.
- “Last Generated” date is date each member last generated a StockWatcher Report for that stock, not the stock study!
- “No” in “Link Established” column can mean no study is selected.
- Each member must sign in & choose which study to use.

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Reports & Charts

My Favorite Reports Reset

- Valuation Statement**
Displays consolidated club portfolio, cash value, and cash balance.
- Member Status**
Displays value of club, along with cost basis and ownership of each member.
- Company Size Diversification Graph**
Displays pie chart of portfolio diversification by company size.
- Global Diversification Graph**
Displays pie chart of diversification of club portfolio by country of owned companies.
- Club Benchmark & Performance Report**
Benchmarks club's compound annual return versus S&P 500 and other indexes.
- Portfolio Summary**
Displays key indicators relating to price and valuation of holdings.
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 Sector/Industry
 EPS Growth Rate

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StockWatcher Assignments

Each stock in your club requires a **StockWatcher**, and only one **StockWatcher** can be assigned to any company (but one member can be assigned many stocks). Each **StockWatcher's** SSGPlus stock studies will be used to populate the data and judgment in the club's myICLUB.com **Portfolio** and **StockWatcher Reports**. ([How do I import my SSGs?](#))

Security	Assigned To	SSGPlus Link Established	Last Generated
Apple (AAPL)	Doug Gerlach	Yes	1/15/24
Air Lease (AL)	Earl ZZ Alphonse	Yes	8/3/21
Century Communities (CCS)	Russell Malley	Yes	7/27/21
Church & Dwight (CHD)	Doug Gerlach	Yes	3/13/23
Darden Restaurants (DRI)	Doug Gerlach	Yes	3/13/23
Electrolux AB Class B ADR (ELUXY)	Earl ZZ Alphonse	No	N/A
Extra Space Storage (EXR)	Doug Gerlach	No	4/13/21
Fastenal (FAST)	Earl ZZ Alphonse	Yes	8/3/21

StockWatcher
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STEP 5: UPDATE SSG PLUS STOCK STUDY

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Link SSGs to myICLUB.com



- Each month (or on schedule set by club), members update their SSGPlus stock studies on BI website with current data, price, & judgment.
- Date of last data & price is shown on all myICLUB Portfolio Reports with name of StockWatcher.

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Updating studies in SSGPlus



- Updating studies in SSGPlus isn't automatic. Update regularly!
- From Studies or Portfolios, click **Update** button for the stock or portfolio you want to update.
- Choose to update price only, data and price, or create a new copy of the study, then click OK.
 - If you create a new copy, make sure to update the My Assigned Stocks page in myICLUB to use the new stock study.
- Check Portfolio Summary or similar to confirm last updates.

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The screenshot displays the 'Portfolios' section of the SSGPlus interface. It features a table with columns for 'Actions', 'Name', 'Date Created', and 'Description'. The table lists several study entries, including 'All Studies', 'Studies Not In A Portfolio', 'Portfolio Actual', 'Copied studies', and 'From Members'. An orange arrow points to the 'Update' button (a green circle with a refresh icon) for the 'Portfolio Actual' entry. Below the table, a modal dialog titled 'Get Latest Company Data for "PLOW"' is open, showing three options: 'Overwrite company data in this study (price only)', 'Overwrite company data in this study (data and price)', and 'Create a copy of this study with updated company data'. The 'Overwrite company data in this study (data and price)' option is selected. The dialog has 'Ok' and 'Cancel' buttons at the bottom. Another orange arrow points to the 'Update' button for the 'Copied studies' entry in the table below.

Actions	Name	Date Created	Description
	All Studies		
	Studies Not In A Portfolio		
	Portfolio Actual	5/14/2020 11:19:22 AM	Stocks I hold, or am interested in
	Copied studies	4/16/2021 2:36:10 PM	Studies copied from members.
	From Members	6/27/2022 10:14:55 AM	Studies imported from members

Showing 1 to 6 of 6 entries

Studies

Show 25 entries

Actions

Get Latest Company Data for "PLOW"

Overwrite company data in this study (price only)

Overwrite company data in this study (data and price)

Create a copy of this study with updated company data

Ok Cancel

NVIDIA NVDA NVDA 6/10/24 6/10/2024 2:01:06 PM 6/7/20

NetEase NTES NTES 5/29/24 5/29/2024 10:48:55 AM 5/28/20

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StockWatcher

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Portfolio Summary Report






A quick overview of stocks that might be compelling buys or sells, using data and judgment from each StockWatcher's most recent BetterInvesting Online Tools SSG stock study. ([How do I import my SSGs?](#))

Dollar-Weighted Portfolio Averages for Portfolio

Projected Total Return: 14.6%	Reward/Risk Ratio: 40.1:1	Total Value: \$4,413.96
Projected EPS Growth: 5.9%	Current P/E Ratio: 22.6	Relative Value: 122.7%

Values marked "nmf" cannot be calculated for companies not linked to BI Online Tools SSGs. Securities that are not common stocks or REITs are excluded from average calculations.

Ticker	Company	% Port	Price Date	Price	Curr PE	Rel Val	Tot Ret	Rwd Rsk	Buy Blw	Sell Abv	Rec
AAPL	Apple Inc <small>(Sean Fulrang, 6/17/2024)</small>	7.0	6/14/2024	212.49	33.0	138.0%	-2.2	-0.4	156.20	170.10	Sell
ABBV	AbbVie Inc <small>(Sean Fulrang)</small>	7.0	6/10/2024	170.46	50.6	178.8%	<i>No SSGPlus Link Established</i>				
AL	Air Lease Corp <small>(Sean Fulrang)</small>	6.6	6/10/2024	45.95	9.3	94.9%	<i>No SSGPlus Link Established</i>				

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STEP 6: VIEW MYICLUB.COM PORTFOLIO REPORTS

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myICLUB.com Portfolio Reports



- Portfolio Diversification Reports are not affected – only reports with “judgment” (EPS & Revenue projections, estimated future P/E ratios, high & low price selections) pull in data from member SSGs:
 - Portfolio Summary
 - Portfolio Review
 - Portfolio Offense
 - Portfolio Defense
 - Portfolio Trend
- **Prices come from SSG—unless no study is linked, in which case prices come from club’s official Valuation.**
- Help & descriptions of fields included in Quick Start or from Help link on page.
- Check the Videos tab in myICLUB for a webinar covering the 40+ Reports and Graphs of myICLUB.com
- Attend the July 2024 webinar for an in-depth look at **Portfolio Review Report.**

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Portfolio Summary Report



A quick overview of stocks that might be compelling buys or sells, using data and judgment from each StockWatcher's most recent BetterInvesting Online Tools SSG stock study. ([How do I import my SSGs?](#))

Dollar-Weighted Portfolio Averages for Portfolio

Projected Total Return: 13.0% Reward/Risk Ratio: 33.3:1 Total Value: \$4,413.96
Projected EPS Growth: 6.9% Current P/E Ratio: 22.4 Relative Value: 105.8%

Values marked "n/m" cannot be calculated for companies not linked to BI Online Tools SSGs.

Securities that are not common stocks or REITs are excluded from average calculations.

Ticker	Company	% Port	Price Date	Price	Curr PE	Rel Val	Tot Ret	Rwd Rsk	Buy Blw	Sell Abv	Rec
AAPL	Apple Inc (Sean Pulrang, 6/17/2024)	7.9	6/14/2024	212.49	33.0	138.0%	-2.2	-0.4	156.20	170.10	Sell
ABBV	AbbVie Inc (Sean Pulrang, 6/17/2024)	7.0	6/14/2024	168.59	50.0	175.3%	-12.8	-1.1	N/A	N/A	N/A
AL	Air Lease Corp (Sean Pulrang, 6/17/2024)	6.6	6/14/2024	44.72	9.0	-217.6%	20.9	5.6	52.20	90.00	Buy
APAM	Artisan Partners (Sean Pulrang, 6/17/2024)	7.0	6/14/2024	39.80	12.1	111.0%	17.1	1.6	33.70	55.70	Hold
BTI	British American Tobacco (Sean Pulrang, 6/17/2024)	3.1	6/14/2024	30.63	0.0	0.0%	43.1	304.0	63.00	128.60	Buy

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Portfolio Review Report

A comprehensive summary of key fundamental changes and values of stocks in the club's portfolio, using data and judgment from each **StockWatcher's** most recent BetterInvesting **SSGPlus** stock study. ([How do I import my SSGs?](#))

Show extended report

Tip: Move your mouse over the column headers to display definitions.

Company	Qtr End	EPS		Sales		Pre-Tax Profit			TTM EPS			Price	Proj RV	5 Yr Avg P/E Ratio			Est EPS Grwth	PEG Ratio	Rwd./Rsk Ratio	% Total Ret	5-Yr Est Prices	
		\$	% Chg	Mill \$	% Chg	Mill \$	% Chg	% Sales	\$	% Chg	Proj PE			Hi	Avg	Lo					Lo	Hi
AAPL <small>(Sean Pulrang, 6/17/2024)</small>	3/24 03/23	1.53 1.52	0.7	90753.0 94836.0	-4.3	28058.0 28382.0	-1.1	30.9 29.9	6.43 5.89	9.2 33.4	212.49 6/14/24	124.8	30.1	26.8	23.4	-1.0	-33.4	-0.4	-2.2	142	184	
ABBV <small>(Sean Pulrang, 6/17/2024)</small>	3/24 03/23	0.77 0.13	492.3	12310.0 12225.0	0.7	1755.0 475.0	269.5	14.3 3.9	3.37 4.23	-20.3 46.3	168.59 6/14/24	399.3	14.1	11.6	9.1	8.0	5.8	-1.1	-12.8	78	70	
AL <small>(Sean Pulrang, 6/17/2024)</small>	3/24 03/23	0.87 1.06	-17.9	663.3 636.1	4.3	135.3 158.3	-14.5	20.4 24.9	4.96 4.12	20.4 7.9	44.72 6/14/24	79.5	11.4	10.0	8.5	14.0	0.6	5.6	20.9	33	109	
APAM <small>(Sean Pulrang, 6/17/2024)</small>	3/24 03/23	0.84 0.72	16.7	264.4 234.5	12.7	108.7 90.4	20.1	41.1 38.6	3.28 2.75	19.3 11.2	39.80 6/14/24	102.1	13.9	11.0	8.0	8.5	1.3	1.6	17.1	23	67	

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Portfolio Offense Report

To help identify stocks that are overvalued or offer low projected future returns, using data and judgment from each **StockWatcher's** most recent BetterInvesting **SSGPlus** stock study. ([How do I import my SSGs?](#))

Company	Ticker	Qtr End	Relative Value	Projected Rel Val	Rwd/Rsk Ratio	Total Return
Apple Inc <small>(Sean Pulrang, 6/17/2024)</small>	AAPL	03/24	138.0%	124.8	-0.4	-2.2
AbbVie Inc <small>(Sean Pulrang, 6/17/2024)</small>	ABBV	03/24	175.3%	399.3	-1.1	-12.8
Air Lease Corp <small>(Sean Pulrang, 6/17/2024)</small>	AL	03/24	-217.6%	79.5	5.6	20.9
Artisan Partners <small>(Sean Pulrang, 6/17/2024)</small>	APAM	03/24	111.0%	102.1	1.6	17.1
British American Tobacco <small>(Sean Pulrang, 6/17/2024)</small>	BTI	12/23	0.0%	0.0	304.0	43.1

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Portfolio Defense Report

To help identify companies with deteriorating fundamentals, using data and judgment from each **StockWatcher's** most recent BetterInvesting **SSGPlus** stock study. ([How do I import my SSGs?](#))

Company	Ticker	Qtr. End	SALES			PRE-TAX PROFIT			EPS			
			% ACE Growth	% Est Growth	% Chg Sales	% ACE EPS Growth	% Est EPS Growth	% Chg. PTP	% Diff PTP	% Chg. EPS	% Diff EPS	
Apple Inc <small>(Sean Fulrang, 6/17/2024)</small>	AAPL	03/24	3.8%	-1.2	-4.3 -0.9	259.2 -25.0	12.9%	-1.0	-1.1 5.7	14.0 -671.0	0.7 9.2	-166.0 -1017.0
AbbVie Inc <small>(Sean Fulrang, 6/17/2024)</small>	ABBV	03/24	3.1%	6.0	0.7 -4.1	-88.3 -168.7	34.0%	8.0	269.5 -16.6	3268.4 -306.9	492.3 -20.3	6053.9 -354.1
Air Lease Corp <small>(Sean Fulrang, 6/17/2024)</small>	AL	03/24	N/A	10.0	4.3 15.1	-57.3 50.8	N/A	14.0	-14.5 17.6	-203.5 25.9	-17.9 20.4	-228.0 45.6
Artisan Partners <small>(Sean Fulrang, 6/17/2024)</small>	APAM	03/24	11.3%	2.5	12.7 6.2	408.8 148.4	N/A	8.5	20.1 33.5	136.9 294.1	16.7 19.3	96.1 126.7

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Portfolio Trend Report

To review the "trend of trends" of key growth performance factors, using data and judgment from each **StockWatcher's** most recent BetterInvesting **SSGPlus** stock study. ([How do I import my SSGs?](#))

% Annual Change for Latest & Previous Quarters																
Ticker	Company	Size	Qtr. End	Qtrly Sales	Qtrly PTP	Qtrly EPS	TTM EPS	% Est		% ACE		# of Shares	Current Price	Price Date	Proj	
								EPS Growth	EPS Growth	EPS Growth	EPS Growth				Total Value	Tot Return
AAPL	Apple <small>(Doug Gerlach, 7/12/23)</small>	Large	03/23 12/22	-2.5 -5.5	-5.8 -13.6	0.0 -10.5	-4.4 -2.5	8.0	12.9%	404.55	170.33	4/30/24	68,907.67	-4.2%	16.0	
AL	Air Lease <small>(Earl Alphonse, No SSGPlus Link)</small>	Mid-sized	03/24 12/23	4.3 19.1	-14.5 47.9	-17.9 56.2	20.4 -547.8	N/A	N/A	200.00	50.24	4/30/24	10,048.00	N/A	2.3	
CCS	Century Communities <small>(Russell Malley, 5/22/24)</small>	Mid	03/24 12/23	26.0 2.2	91.6 23.1	92.3 14.6	-29.2 -49.3	10.0	N/A	400.00	79.32	4/30/24	31,728.00	3.5%	7.4	
CHD	Church & Dwight <small>(Doug Gerlach, No SSGPlus Link)</small>	Large	03/24 12/23	5.1 6.4	5.7 -187.2	13.4 -191.2	89.8 82.0	N/A	7.8%	50.00	107.89	4/30/24	5,394.50	N/A	1.3	
	Darden															

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USING STOCKWATCHER REPORTS

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Using StockWatcher Reports



- myICLUB StockWatcher Reports are designed to help clubs focus on what's most important in reviewing changes to stocks held in portfolio.
- When SSGPlus studies are linked, StockWatcher blends market information with the Stock Study into a convenient summary report.
- StockWatcher reports can be generated without a linked study, but will use default judgments.

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Generating StockWatcher Report



- Go to **Reports > Generate StockWatcher Report**.
- Click **Generate StockWatcher Report** link next to assigned company.
- Can also select any stock from drop-down list, but the site will use default judgements if you aren't the stock watcher.

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Generate StockWatcher Report

The StockWatcher Report can be used as an outline of key fundamental factors that an investment club should review on a regular basis, and is designed to be presented at a club meeting along with your own research to augment the information provided in the report. If available, your **SSGPlus** stock studies are used to populate the data and judgment ([How do I import my SSGs?](#)). If no SSGPlus stock study is available, default judgment is used.

Doug Gerlach is the club's official StockWatcher for the following securities:

Apple (AAPL)	Generate StockWatcher Report
Church & Dwight (CHD)	Generate StockWatcher Report <i>(Uses default judgment)</i>
Darden Restaurants (DRI)	Generate StockWatcher Report
Extra Space Storage (EXR)	Generate StockWatcher Report <i>(Uses default judgment)</i>
Globus Medical (GMED)	Generate StockWatcher Report <i>(Uses default judgment)</i>
Meta Platforms Inc (META)	Generate StockWatcher Report
Miller Industries (MLR)	Generate StockWatcher Report <i>(Uses default judgment)</i>
Walgreen Boots Alliance (WBA)	Generate StockWatcher Report

You may also generate a StockWatcher report for any of the securities currently held in the club's portfolio:

Apple (Doug Gerlach)

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Monthly

Unified Report

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Portfolio

Company Size

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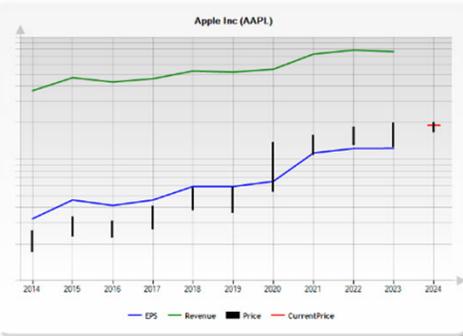
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Miller Industries (MLR)	Generate Stock
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You may also generate a StockWatcher report for an

Apple Inc (AAPL)



Overview

Apple is in the Consumer Electronics industry group, which is a component of the Technology sector. With TTM revenues of \$383,285.00M, it is considered a mega-sized company. With a current market capitalization of \$3,018,615.22M, it is a mega-cap stock.

Apple appears on the myICLUB Investment Club Top 40 as of April 2024. The myICLUB Top 40 reports on the stocks most widely owned, sold, and purchased by clubs and is updated each month. In the most recent myICLUB Top 40, Apple is ranked:

- number 1 of securities most widely owned by investment clubs
- number 4 of securities most purchased by investment clubs
- number 1 of securities most sold by investment clubs

Growth

The most recent quarter ended on 3/31/2024. For that period, the company increased EPS by 0.7%. This is lower than analysts' expected long-term EPS growth. Over the trailing twelve months, EPS increased by 9.2%. This is lower than analysts' expected long-term EPS growth. Further investigation is required to determine and understand the reasons why EPS growth is growing below long-term growth expectations. If this trend continues, the company's long-term prospects may be in jeopardy. How does this recent growth compare to the projected EPS growth rate on the club's SSG for Apple?

In that same period, the company decreased Revenues by 4.3%. Over the trailing twelve months, Revenues

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WHAT'S AHEAD?

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Upcoming Enhancements



- More graceful support for non-Stock securities (REITs, PTPs, ETFs, mutual funds, etc.).
- Some Portfolio Reports still using Analysts' EPS Estimates, not user judgment, & will be adjusted.
- Allow StockWatcher Report to be generated with club's official StockWatcher data, with member's own data, or with default judgment.

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Questions?



Russell
Malley

Sean
Pulrang

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Get Help When You Need It!



- Review the Quick Start Guide:
 - Available in myICLUB.com File Storage.
- Click Help:
 - On any myICLUB.com page.
- Check the FAQs:
 - www.ICLUB.com/faq/
- ICLUBcentral Webinars
 - www.ICLUB.com/webinars/
- Online Help from ICLUBcentral
 - www.iclub.com/support/
- Telephone Support from ICLUBcentral
 - 877-33-ICLUB, 9:30 AM - 6:00 PM ET, Mon-Fri

Our Next Investment Club Webinar Topic



Tuesday, July 16, 2024:
**Digging Into the myICLUB Portfolio
Review Report**

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Thank You!

CONTACT US AT WWW.MYICLUB.COM WITH ANY QUESTIONS.



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Sean
Pulrang