

Link Member SSGPlus or SSGCore Stock Studies to Your myICLUB Club Portfolio

MYICLUB.COM INVESTMENT CLUB WEBINAR – AUGUST 2026



Your Hosts



Douglas Gerlach
President,
ICLUBcentral Inc.



Russell Malley
Club Accounting Advisor,
myICLUB



Sean Pulrang
Senior Support
Representative,
myICLUB

Handout & Questions



- Handout for this webinar is available in PDF format in **Materials** section.
- Type questions at anytime into **Questions** box.

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WHAT IS THE MYICLUB-TO-SSG LINK?

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What Is myICLUB-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.
- Members must have BI membership with Online Tools subscription.
 - Studies can be linked from SSGPlus or CoreSSG.
 - If desired, single club member could manage & link all SSG stock studies to their myICLUB.com club.
- When linked, data & judgment from SSG will display on myICLUB portfolio reports.

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 LINK BI & MYICLUB ACCOUNTS

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Members Link BI 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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myICLUB

Your Clubs:
Any I.C. ▼

Welcome, Alantis
My Account | Logout

Home Help

My Account Home
Change Username
Change Password
Change Security Question
Change Contact Info
Email Preferences
Establish BI Link

Establish BI Link

Many of the myICLUB.com Portfolio Reports require values that are derived from the Stock Selection Guide. In order to populate these reports, designated StockWatchers in a myICLUB.com investment club must use the SSG Plus tool at the BetterInvesting.org website (separate subscription required) to complete and update their assigned stock studies. Each myICLUB.com member must then establish a link to their BetterInvesting.org account.

BI Username:

BI Password:

Establish Link

Not a BetterInvesting club or BetterInvesting member? [Visit BetterInvesting for information on membership for you and your club.](#)

myICLUB.com Investment Club Webinar
By Doug Gerlach, ICLUBcentral Inc.



Your Clubs:

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Establish BI Link

Many of the myICLUB.com Portfolio Reports require values that are derived from the Stock Selection Guide. In order to populate these reports, designated StockWatchers in a myICLUB.com investment club must use the SSG Plus tool at the BetterInvesting.org website (separate subscription required) to complete and update their assigned stock studies. Each myICLUB.com member must then establish a link to their BetterInvesting.org account.

 Your ICLUB-BI link is established. Your BI # is .

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.

[Unlink](#)

Not a BetterInvesting club or BetterInvesting member? [Visit BetterInvesting for information on membership for you and your club.](#)



STEP 2: CLUB OFFICER ASSIGNS STOCKS

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.
 - Each stock can have only one StockWatcher. One member can manage many stocks.
 - 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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Reports & Charts

My Favorite Reports

★ 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.

My Watch List Stocks
Displays a list of the stocks you've added into the club's watchlist.

Club StockWatcher Assignments
Displays which members are assigned to which stocks. Edit assigned stocks.

Club Watch List Report
Keep track of members' ideas for future investments in club's portfolio.

ANY IC

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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)	--Not Assigned--	No	N/A
Extra Space Storage (EXR)	Doug Gerlach	No	4/13/21

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STEP 3:

CREATE SSG WITH ONLINE TOOLS

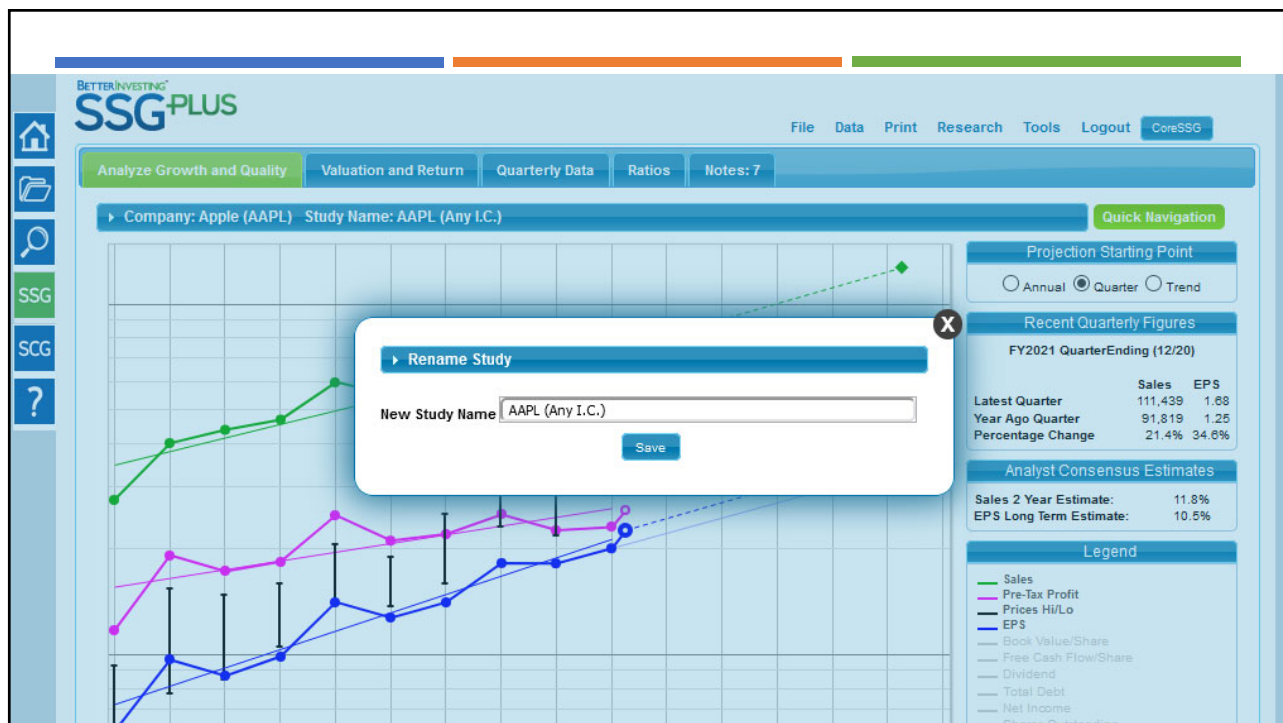
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Create SSG with Online Tools



- If SSG study already exists, this step can be skipped.
- Otherwise, member logs into BetterInvesting.org website & creates SSG in SSGPlus or CoreSSG.
 - 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.
 - Can also organize SSG studies by including in Online Tools portfolio that user creates.
- Make sure study is complete! Studies without judgment won't fill in reports.

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STEP 4: LINK SSG TO MYICLUB.COM

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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 SSG study.
- Click “--Not Linked--” drop-down menu for list of your completed SSG studies.
- Click study to be used in myICLUB reports.
- Repeat for each assigned stock.
- Click **Submit** to save choices.

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Displays pie chart of portfolio diversification by company size.

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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.

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Displays value of club, along with cost basis and ownership of each member.

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Displays pie chart of diversification of club portfolio by country of owned companies.

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Keep track of members' ideas for future investments in club's portfolio.

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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.) --Not Linked-- AAPL 8/17/21 AAPL (Any I.C.) AAPL 6/14/21	7/12/23	1/15/24	Go to SSGPlus Generate StockWatcher
Church & Dwight (CHD)			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” is date each member last generated a StockWatcher Report for that stock.
- “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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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.
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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)	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

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STEP 5:

UPDATE STOCK STUDY

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Update linked SSG studies



- Each month (or on schedule set by club), members update their SSGPlus or CoreSSG stock studies on BI website with current data, price, & judgment.
- In SSGPlus or CoreSSG go to **Data > Refresh Study Data**.
- Choose update option.
 - Update stock closing price.
 - Overwrite company data and stock current price.
 - Create a copy of this study with updated company data and stock current price.
- Click **Refresh Data** to update and save study.

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► Refresh Data From Data Service

Select Refresh Data Option:

- ☐ Update stock closing price in this study. **The price date is more than 7 days old.**
- ☐ Overwrite company data and stock current price in this study.
- ☒ Create a copy of this study with updated company data and stock current price.

Study Name

Comment

Note: Creating copy will require re-linking in myICLUB.

Refresh Data

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Update Linked SSG choice in myICLUB



- If you chose **Update stock closing price** or **Overwrite company data and stock current price**, reports in myICLUB update automatically.
- If you chose **Create a copy of this study**, return to **myICLUB > Reports &** select **My Assigned Stocks**.
- Click drop-down menu showing the SSG name and choose the most recently updated study.
- Click **Submit** to save the selection.
- Date of last data & price will update on all myICLUB Portfolio Reports with name of 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: 9.4%	Reward/Risk Ratio: 11.0:1	Total Value: \$429,827.11
Projected EPS Growth: 8.2%	Current P/E Ratio: 30.1	Relative Value: 136.8%

Values marked "nfm" 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 (Doug Gerlach, 7/12/2023)	16.0	7/11/2023	188.08	31.9	201.1%	0.2	0.0	76.10	147.60	Sell
AL	Air Lease (Earl Alphonse)	2.3	4/30/2024	50.24	10.2	104.1%	No SSGPlus Link Established				
CCS	Century Communities (Russell Malley, 5/22/2024)	7.4	5/21/2024	86.91	9.6	159.2%	11.0	1.4	70.00	120.10	Hold
CHD	Church & Dwight (Doug Gerlach)	1.3	4/30/2024	107.89	34.3	122.1%	No SSGPlus Link Established				

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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.

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Stock Prices & Support Notes



- Prices come from **SSG**. If no study is linked, prices come from club's official **Valuation**.
 - For this reason, best for members to update SSGs close to meeting so data is most current.
- Help & descriptions of fields are in **Quick Start Guide** or in **Help** link on page.
- **TIP:** Check the Videos tab in myICLUB for webinar replays covering the 40+ Reports and Graphs of myICLUB.com & in-depth look at **Portfolio Review Report**.

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Portfolio Trend Report



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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 EPS Growth	% ACE EPS Growth	# of Shares	Current Price	Price Date	Total Value	Proj Tot Return	% of Port
AAPL	Apple (Doug Gerlach, 7/12/23)	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 (Earl Alphonse, No SSGPlus Link)	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 (Russell Malley, 5/22/24)	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 (Doug Gerlach, No SSGPlus Link)	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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New SSG Display in Portfolio Summary



- Portfolio Summary Report can now display **completed SSG** of any linked SSG study.
- Look for “SSG” link next to company name on Portfolio Summary Report.
- SSG is in PDF format, so check browser’s downloads folder if it doesn’t display automatically.

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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: 11.5%

Reward/Risk Ratio: .9:1

Total Value: \$652,786.58

Projected EPS Growth: 9.9%

Current P/E Ratio: 19.8

Relative Value: 89.2%

Securities with no linked SSG, or that are not common stocks or REITs are excluded from Portfolio Average Calculations.

Ticker	Company	% Port	Price Date	Price	Curr PE	Rel Val	Tot Ret	Rwd Rsk	Buy Blw	Sell Abv	Rec
AAPL	Apple (SSG) (Doug Gerlach, 8/18/2026)	17.5	8/17/2026	305.59	35.0	125.5%	5.3	0.5	203.00	325.10	Hold
ARX.TO	Arc Resources (SSG) (Doug Gerlach, 8/18/2026)	3.2	8/17/2026	33.43	13.5	150.8%	10.1	0.9	24.70	40.40	Hold
CCS	Century Communities (SSG) (Russell Malley, 8/18/2026)	3.0					-4.6	-0.6	43.40	50.30	Sell
CHD	Church & Dwight (SSG) (Doug Gerlach, 8/18/2026)						8.7	1.5	87.50	122.80	Hold
DRI	Darden Restaurants (SSG) (Doug Gerlach, 8/18/2026)	0.6	8/17/2026	225.50	21.6	116.4%	10.8	1.1	178.80	285.50	Hold
EXS	Extra Space Storage (SSG)										

Click SSG link
next to company
name,

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StockWatcher

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Portfolio Summary Report

A quick overview of stocks that might be compelling. This report is generated using the most recent BetterInvesting Online Tools SSG stock selection guide.

Dollar-Weighted Portfolio Averages for Portfolio

Projected Total Return: 11.5%
Projected EPS Growth: 9.9%

Securities with no linked SSG, or the

Ticker	Company	% Port
AAPL	Apple (SSG) (Doug Gerlach, 8/18/2026)	17.5
ARX.TO	Arc Resources (SSG) (Doug Gerlach, 8/18/2026)	3.2
CCS	Century Communities (SSG) (Russell Malley, 8/18/2026)	3.0
CHD	Church & Dwight (SSG) (Doug Gerlach, 8/18/2026)	0.6
DRI	Darden Restaurants (SSG) (Doug Gerlach, 8/18/2026)	0.6
EXS	Extra Space Storage (SSG)	-

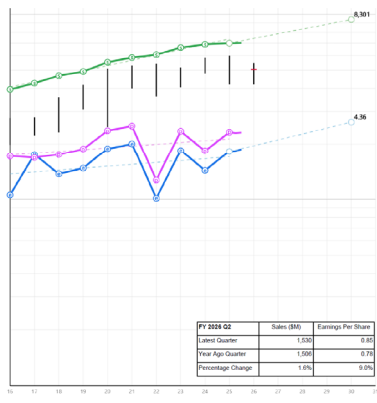
BETTER INVESTING
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Stock Selection Guide

Company: Church & Dwight Co. Date: 08/17/2026
Prepared by: Doug Gerlach Date when from: 08/17/2026
Where traded: NYSE Industry: Household & Personal Products
Capitalization: Outstanding Amounts: 2,252.2 % to Total Cap: 94.2 % to Total Cap: 94.2
Preferred: 0.0 % to Total Cap: 0.0 %
Common: 2,252.2 % to Total Cap: 94.2 % to Total Cap: 94.2
Debt: 0.0 % to Total Cap: 0.0 % to Total Cap: 0.0 %

Symbol: CHD

1 VISUAL ANALYSIS of Sales, Earnings, and Price



FY 2024 Q2	Sales (\$M)	Earnings Per Share
Latest Quarter	1,530	0.85
Year Ago Quarter	1,500	0.75
Percentage Change	1.6%	0.0%

(1) Historical Sales Growth: 6.9% (3) Historical Earnings Per Share Growth: 3.4%
(2) Estimated Future Sales Growth: 6.0% (4) Estimated Future Earnings Per Share Growth: 7.0%

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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 SSG studies are linked, StockWatcher blends market information with the Stock Study into a convenient summary report.
- StockWatcher reports generated without a linked study, 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 (Uses default judgment)
Darden Restaurants (DRI)	Generate StockWatcher Report
Extra Space Storage (EXR)	Generate StockWatcher Report (Uses default judgment)
Globus Medical (GMED)	Generate StockWatcher Report (Uses default judgment)
Meta Platforms Inc (META)	Generate StockWatcher Report
Miller Industries (MLR)	Generate StockWatcher Report (Uses default judgment)
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:

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Member Status

Portfolio
Company Size

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 (Uses default judgment)
Darden Restaurants (DRI)	Generate StockWatcher Report
Extra Space Storage (EXR)	Generate StockWatcher Report (Uses default judgment)
Globus Medical (GMED)	Generate StockWatcher Report (Uses default judgment)
Meta Platforms Inc (META)	Generate StockWatcher Report
Miller Industries (MLR)	Generate StockWatcher Report (Uses default judgment)
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:

Date Report Generated: 5/23/2024 8:13:58 PM, by Doug Gerlach, Any I.C.

Overview

Apple is in the Consumer Electronics industry group, which is a component of the Technology sector. With TTM revenues of \$383,285,000, it is considered a mega-sized company. With a current market capitalization of \$1,016,615,226, 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 8.7%. This is lower than the analysts' expected long-term EPS growth. Over the trailing twelve months, EPS increased by 9.2%. This is lower than the 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 decreased by 0.9%. How does this recent growth compare to the projected Revenues growth rate on the club's SSG for Apple?

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Questions?



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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



Tuesday, September 15, 2026

Self-Help for Investment Clubs: Getting Help with myICLUB & Investment Club Operations

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Thank You!

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





LINK MEMBER SSG STOCK STUDIES TO MYICLUB

Sean Pulrang
August 2026