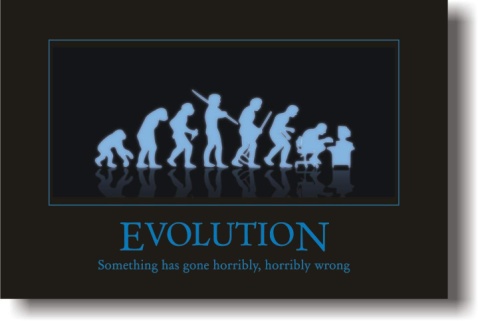
**The Strangemen IV Investment Club (HBHXX74T)**

Minutes of the sixteenth meeting - Held Wednesday 26th September, 2018 at The Mill Street Club, Mill Street, Leek.



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| Attendees:   * James Taylor (JT) ,Alan Whitmore (AJW), Neil C Pickford (NCP), Dave Swarbrook (DS), David McNeaney (DMcN), Matt Culverwell (MC), Emma Chadwick (EC), Newton (the guffin' dog) (NTD), Ziggy On (ZM) , Sridar Madadi (SM) and Dean Goodwin (DG) Guest Star.   Apologies:   * Mike Helm (MH) - the emoji for a shrug! * Gareth Ekin (GE) - Channeling his inner Rees Mogg, as he goes offshore with his assets * Andy Bradley (AMB) – was coming last week, then wasn't, then maybe, then .......................... * Jes Challand (JC) - "[**Chat échaudé craint l’eau froide**.](https://frenchtogether.com/wp-content/uploads/2018/03/Il-ny-a-que-les-imbeciles-qui.mp3)" - This month, Jes shares his initials with "Jamie Cureton" - veteran striker / coach of Southern League Premier Division club Bishop's Stortford. Image result for Jamie Cureton | |
| **Agenda:**   * 1. Okay previous minutes   2. Previous Actions   3. Treasurers Report & current portfolio update   4. Investment strategy & Homework (share updates)   5. Fantasy Shares   6. Peston   7. AOB   8. Next Meeting | |
| **1. Okay Previous Minutes**  What, there were minutes - no way - seriously, does anyone read this ? Until 1994, world maps and globes sold in Albania only had Albania on them. |  |
| **2. Previous Actions**  **2.3.1 - NCP to email TDW re: currency error on account and what is needed to trade in US - Info received but memberships require sorting with TDW - back to NCP - NCP to grab papers. ongoing**  **5.11.1 - Sri to investigate YU Group - nuclear rod reuse? Still to do – No news**  **3.16.1 - James owes Dave McN £10.**  7.16.1 - DMcN advised he would come up with some tweaks to the agenda that he has been mulling.  7.16.2 - Steve Smith (Cheadle ex BBS) is apparently interested in joining - to be invited to attend.  7.16.3 - Dean Goodwin enjoyed what he saw and asked for details about joining - he would like to attend again. | **NCP**  **SM**  **JT** |
| **3. Treasurers Report & current portfolio update**  The club has cash of £5507.22. Cash at Barclays is £203.32. £1,000 in House Crowd (JT chasing), £408.85 in Crypto. Divis - 3/8 Vodafone £33.82, 24/9 Merlin £6.55. Sold Versarien for £908.69 on 24/8. Each member has 24 units purchased at £30 each. Each unit now worth £34.19, an increase of 13.69%. £720 now worth £820.55.  **Portfolio**   |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | **Symbol** | **Qty.** | **Description** | **Champion** | **Market Value** | **Book Cost** | **Gain/Loss** | **Prev Month** | **Variance** | | HLMA | 70 | HALMA | JT | 1417.00p | 13.0p | 991.9 | 990.12 | 1.78 | | HAYD | 414 | HAYDALE GRAPHENE INDUSTRIES PLC | ? | 41.00p | -2.0p | 169.74 | 499.56 | -329.82 | | JE. | 129 | JUST EAT | DS | 691.80p | 7.6p | 892.42 | 996.07 | -103.65 | | MERL | 262 | MERLIN | DMcN | 397.20p | 4.7p | 1040.66 | 997.71 | 42.95 | | PURP | 148 | PURPLE BRICKS | AJW | 245.00p | 8.8p | 362.6 | 747.41 | -384.81 | | KETL | 516 | STRIX GROUP PLC | NCP | 165.00p | 1p | 851.4 | 748.91 | 102.49 | | TSTR | 1156 | TRI-STAR RESOURCES | SM | 40.00p | -2.5p | 462.4 | 750 | -287.6 | | VOD | 372 | VODAFONE | SM | 166.94p | -1.8p | 621.02 | 749.37 | -128.35 |   **4. Investment Strategy and Homework (Share updates)**  Areas of focus - owners - Aerospace & Defense – AJW, Automobiles & Parts – EC, Electronic & Electrical Equipment – DMcN, Gas, Water & Multi Utilities – DSW & AJW, Health Care Equipment & Services – EC & NCP, Mining – JT, Mobile Telecommunications – MC, Pharmaceuticals & Biotechnology – DSW & JT & NCP, Software & Computer Services – MC, Travel & Leisure – DMcN  Homework – Haydale have re-organised to 2 core divisions. Sales up 13%. Purplebricks - Australian legal issues abound and doubt as to whether the model they use will even work down under. Strix - new coffee machine collaboration. projections are for upwards trajectory. Tri-star - results due re: production site bu October. Gained tax relief from Oman for initiative. Vodafone - series of investments in order to reach 2020 aspired targets. Halma - Buy rating from analysts. Merlin (DMcN) - n/a. Just Eat (DS) - n/a.  4.12.1 - Tabled shares and info – More Versarien. Sumo group (gaming), noted.com, autotrader, immotion (VR) and commercial drone usage.  4.16.1 - NCP to buy - £1000 Versarien, £750 Sumo, £500 Immotion  **5. Fantasy Shares**  5.14.1 - New competition up and running - not everyone taking part it appears. Position at Sunday 21.10.2018  .  Discussion took place about reverting back to the previous competition next year, as this iteration doesn't seem to be as good as anticipated.  **6. Peston**  13 yr old boy ides from being chased with cheeses - had an allergic reaction in London. Mates threw cheeses at him. Man loses forearm from eating contaminated sushi.71 yr old from S Korea. Woman has contact lens stuck in eye for 28 years - found under MRI and removed from 42 yr old. 1,000 ft of cobwebs on Aitoliko greek island - very small island overrun with spiders. Airline passengers had ear and nose bleeds when the Air India pilot forgot to pressurise the cabin on a Boeing 737. Texan dept of criminal justice found a $18mn haul of coke hidden in 45 boxes of bananas. 60,000 bees found in hospital roof in Cambridge (Fulbourne) - honey had been spotted seeping into the hospital. World's most expensive home with 600 staff, worth $1bn serves a family of 5. belongs to India's wealthiest man - 61 yr old. it is 570ft tall and he has a worth of $34bn in 2017.  **7. AOB**  7.15.1 - Matt to investigate Nielsen Nerswira???? Can’t remember what this was. - a trend identifier.  Emma asked to minute the fact that if we sell or trade in Versarien, Strix or Purple Bricks she will not be able to vote due to a conflict of interest with her new job that asks her to monitor these shares.  7.16.1 - DMcN advised he would come up with some tweaks to the agenda that he has been mulling.  7.16.2 - Steve Smith (Cheadle ex BBS) is apparently interested in joining - to be invited to attend.  7.16.3 - Dean Goodwin enjoyed what he saw and asked for details about joining - he would like to attend again.  **8. Next Meeting**  Wednesday 24th October. Usual Venue at 8.15. It was decided to just muck in on pizza payment - it is soooo much easier that way!  **Side Note - Pizza area for future reference - 18" (254.24") - 14" (153.93") - 12" (113.09") - 9" (63.61")**  A scalded cat fears cold water. English equivalent = Once bitten, twice shy. | **NCP**  **DMcN** |