**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
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| **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**

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| **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 – DMcNHomework – 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** |