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

Minutes of the seventeenth meeting - Held Wednesday 24th October, 2018 at The Mill Street Club, Mill Street, Leek.



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| Attendees:   * James Taylor (JT) ,Alan Whitmore (AJW), Neil C Pickford (NCP), David McNeaney (DMcN), Matt Culverwell (MC), Sridar Madadi (SM) and Dean Goodwin (DG) Guest Star - again!   Apologies:   * Mike Helm (MH) - fingers crossed he will return * Gareth Ekin (GE) - Trying to grow his hair like Trumps * Dave Swarbrook (DS) - post blues blues - meeting * Andy Bradley (AMB) – the usual hokey cokey and then nowt! * Matt Culverwell (MC) - apols sent, but lost in the ether * Emma Chadwick (EC) - as with Matt - collusion!! * Newton (the guffin' dog) (NTD) - the missing leader of the Stafford posse. * Jes Challand (JC) - “Qui court deux lievres a la fois, n’en prend aucun” - This month, Jes shares his initials with "Jenny Craig" - US Diet guru to the stars! Related image | |
| **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 ? Aphids give birth to other pregnant aphids. |  |
| **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. - Done**  7.16.1 - DMcN advised he would come up with some tweaks to the agenda that he has been mulling. -to be passed to NCP  7.16.2 - Steve Smith (Cheadle ex BBS) is apparently interested in joining - to be invited to attend. - Sri to do, as Steve double booked this month.  7.17.3 - Dean to join - date agreed for share cost cutoff - 1.11.2018 (dean.goodwin76@yahoo.com) James, Neil and DG to sort | **NCP**  **SM**  **DMcN**  **SM**  **JT/ NCP/ DG** |
| **3. Treasurers Report & current portfolio update**  The club has cash of £3686.35. Cash at Barclays is £237.32. £1,000 in House Crowd (JT chasing), £416.01 in Crypto. Each member has 25 units purchased at £30 each. Each unit now worth £30.65, an increase of 2.15%. £750 now worth £766.13.  **Portfolio**   |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | **Symbol** | **Qty.** | **Description** | **Champion** | **Market Value** | **Book Cost** | **Gain/Loss** | **Prev Month** | **Variance** | | **HLMA** | **70** | **HALMA** | **JT** | **1250.00p** | **13.0p** | **875** | **990.12** | -115.12 | | HAYD | 414 | HAYDALE GRAPHENE INDUSTRIES PLC | DMcN | 29.00p | -0.5p | 120.06 | 499.56 | -379.5 | | IMMO | 3935 | IMMOTION GROUP |  | 10.00p | -0.12p | 393.5 | 499.91 | -106.41 | | JE. | 129 | JUST EAT | DS | 590.20p | -5.60p | 761.36 | 996.07 | -234.71 | | MERL | 262 | MERLIN | DMcN | 311.40p | -0.60p | 815.87 | 997.71 | -181.84 | | PURP | 148 | PURPLE BRICKS | AJW | 206.60p | -10.20p | 305.77 | 747.41 | -441.64 | | KETL | 516 | STRIX GROUP PLC | NCP | 145.00p | -0.20p | 748.2 | 748.91 | -0.71 | | SUMO | 432 | SUMO GROUP | AJW | 159.00p | -3.50p | 686.88 | 748.72 | -61.84 | | TSTR | 1156 | TRI-STAR RESOURCES | SM | 45.00p | -1.5p | 520.2 | 750 | -229.8 | | VRS | 547 | VERSARIEN | JT | 113.00p | 9.00p | 618.11 | 999.74 | -381.63 | | VOD | 372 | VODAFONE | SM | 146.42p | 0.18p | 544.68 | 749.37 | -204.69 |   **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 – Halma - bought a fire safety company for 9.3mn euros. Haydale - looking at graphene tooling. Just Eat - hit by low hygiene ratings of take aways. Merlin - Legoland sales decline and poor reviews of food at Legoland Windsor. Purple Bricks - 70% of UK online market. double digit growth. Strix - recommended as a strong buy. Tristar - results out final week of October. Versarien - looking at sub sea insulation. Vodafone - investing. Sumo - buy rating in effect. Immotion - offloaded their Japanese division.  4.17.1 - Tabled shares and info – Dean discussed a chap he met - successful investor in London. Mark Strong of Slater Growth - his funds trade via HL. Tate an Lyle also discussed. Markets shot to shit, so nothing purchased  4.16.1 - NCP to buy - £1000 Versarien, £750 Sumo, £500 Immotion - Done  **5. Fantasy Shares**  5.14.1 - New competition up and running - not everyone taking part it appears. Position at Thursday 22.11.2018  .  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**  **A bride secretly fattened her sisters with "slimming smoothies" to look better at her wedding - she did this over a course of months! Man sues Tesco for racial discrimination, as a colleague farts in his face - seeks £20K. David Schwimmer (Ross in Friends) lookalike sought after CCTV footage of a theft in Blackpool - Schwimmer tweeted that it was not him.**  **The holy grail of Whisky - a 1926 bottle, sold for £848,750.**  **School banned bags between classes in Spalding, so a17 yr old boy carried his books in a microwave. A beautician failed roadside test in Manchester City centre and claimed her collagen lips had led to her being unable to use the apparatus correctly leading to a false result. 2 handcuffed inmates tried to escape court in the US. the judge threw off his cape and gave chase. catching 1 four flights down from the court room. Wizz Air flight between Luton and Warsaw, a lady was advised she was unable to use the loo, so she pissed on the floor.**  **7. AOB**  7.17.3 - Dean to join - date agreed for share cost cutoff - 1.11.2018 (dean.goodwin76@yahoo.com) James, Neil and DG to sort  **8. Next Meeting**  Wednesday 28th November - agreed post email vote . 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")**  Who runs after two hares at the same time, catches none. | **JT/ NCP/ DG** |