**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
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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 ? 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 NCP7.16.2 - 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**

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| **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 – DMcNHomework – 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 purchased4.16.1 - 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** |