**The Strangemen IV Investment Club (dugxgxPV4AhY) - may have changed TBC**

Minutes of the twenty sixth meeting - Held Wednesday 4th December, 2019 at The Mill Street Club, Mill Street, Leek.



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| Attendees:   * James Taylor (JT) , Neil C Pickford (NCP), Dave Swarbrook (DS), Alan Whitmore (AJW), Dave McNeaney (DMcN), Sri Madadi (SM), Dean Goodwin (DG), Matt Culverwell (MC), Emma Chadwick (EC) and Newton (the guffin's dog)   Apologies:   * Gareth "Bloody" Ekin (GE) - twice in a decade was pushing it! * Mike Helm (MH) - erm......nope * Andy Bradley (AMB) – voting Bradley? * Jes Challand (JC) - “Les carottes sont cuites”. This month, Jes shares his initials with Joe Cannon, a former USA goalkeeper, who played twice for the USA and had two stints with the San Jose Earthquakes! **Joe_Cannon_-_San_Jose_Earthquakes.jpg** | |
| **Agenda:**   * 1. Previous Actions   2. Treasurers Report  1. Current Share Update 2. Current Digital Update 3. Financial Statement 4. Dividends    1. Homework (Current Portfolio)    2. Strategy for New Investment 5. New Companies 6. Re-investment in Existing Portfolio    1. Fantasy Shares    2. Peston    3. AOB    4. Next Meeting | |
| 1. Okay Previous Minutes What, there were minutes - no way - seriously, does anyone read this ***A bolt of lightning contains enough energy to toast 100,000 slices of bread.*** If you consider that each bolt of lightning contains more than 5 billion Joules of energy, then the average 1000-watt, two-slice toaster could be powered for 84,000 minutes with just one strike. That's just enough time to toast about 100,000 slices of bread, bagels, English muffins—whatever you prefer. |  |
| **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. **Written to by hand with a request for info! Got info!!**  **22.4.3.2** - JT to chase House Crowd for profit details - awaiting 3 properties to be sold. - just 1 property left now. Nope, apparently 2 properties left.  **24.3.2.1** £470.56 in Crypto currencies. It was agreed to take £250 profit - MC to be asked to transfer to JT - to do?  **24.3.3.2** - JT agreed to add a column for individual share purchase price - book cost/ shares held - still to do by JT.  **26.5.1.1 -** Discussions abound and decided to purchase £1,000 of Trig Renewables and an additional £500 Versarien.  **26.5.2.1 -**  An additional £500 Versarien. | **NCP**  **JT**  **MC/JT**  **JT**  **NCP**  **NCP** |
| **3. Treasurers Report**   1. **Current Share Update**  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | **Symbol** | **Qty.** | **Description** | **Champion** | **Mid Price** | **Price Change** | **Market Value** | **Book Cost** | **Gain/Loss** | **Prev Month** | **Variance** | **Cost per share** | **Current price per share** | | ASC | 28 | ASOS PLC | DG | 3109.00p | 29.00p | 870.52 | 976.63 | -106.11 | 983.36 | -112.84 | 34.88 | 31.09 | | CDM | 438 | CODEMASTERS GROUP | DS | 241.50p | 0.00p | 1057.77 | 999.95 | 57.82 | 954.84 | 102.93 | 2.28 | 2.42 | | HAYD | 3312 | HAYDALE GRAPHENE INDUSTRIES PLC | JT | 1.90p | 0.00p | 62.93 | 557.52 | -494.59 | 48.02 | 14.91 | 0.17 | 0.02 | | IMMO | 3935 | IMMOTION GROUP | DG | 6.95p | -0.15p | 273.48 | 499.91 | -226.43 | 289.22 | -15.74 | 0.13 | 0.07 | | MNG | 48 | M&G PLC | DG | 224.80p | -6.20p | 107.9 | 106.81 | 1.09 | 102.24 | 5.66 | 2.23 | 2.25 | | NFC | 125 | NEXT FIFTEEN COMMUNICATIONS | NCP | 470.00p | -5.50p | 587.5 | 746.2 | -158.7 | 615.63 | -28.13 | 5.97 | 4.70 | | PRU | 48 | PRUDENTIAL | DG | 1312.50p | 12.00p | 630 | 642.53 | -12.53 | 655.92 | -25.92 | 13.39 | 13.13 | | PURP | 148 | PURPLE BRICKS | AJW | 105.00p | 4.80p | 155.4 | 747.41 | -592.01 | 167.83 | -12.43 | 5.05 | 1.05 | | RAI | 916 | RA International | MH | 34.40p | -0.10p | 315.1 | 499.88 | -184.78 | 352.66 | -37.56 | 0.55 | 0.34 | | SXX | 8345 | SIRIUS MINERALS | SM | 3.59p | 0.16p | 299.25 | 750 | -450.75 | 248.51 | 50.74 | 0.09 | 0.04 | | SMDS | 204 | SMITH(DS) | NCP | 378.90p | 10.60p | 772.96 | 747.72 | 25.24 | 729.3 | 43.66 | 3.67 | 3.79 | | SUMO | 432 | SUMO GROUP | AJW | 155.00p | -1.75p | 669.6 | 748.72 | -79.12 | 669.6 | 0 | 1.73 | 1.55 | | TSTR | 1156 | TRI-STAR RESOURCES | SM | 36.50p | 0.00p | 421.94 | 750 | -328.06 | 358.36 | 63.58 | 0.65 | 0.37 | | VRS | 547 | VERSARIEN | JT | 93.50p | -3.00p | 511.45 | 999.74 | -488.29 | 511.45 | 0 | 1.83 | 0.94 | | VOD | 372 | VODAFONE | SM | 146.08p | -0.66p | 543.42 | 749.37 | -205.95 | 586.05 | -42.63 | 2.01 | 1.46 | | FAN | 410 | VOLUTION | NCP | 203.00p | 0.00p | 832.3 | 748.31 | 83.99 | 807.7 | 24.6 | 1.83 | 2.03 | |  |  |  |  |  | Totals | 8111.52 | 11270.70 | -3159.18 | 8080.69 | 30.83 |  |  |  1. **Current Digital Update**   **26.3.2.1** £310.07 in Crypto currencies.   1. **Financial Statement**   **26.3.3.1** - The club has cash of £11,314.09. Cash at Barclays is approx £287.32**.** £1140 each in 38 units, now worth £1233.48. 1 Unit = 32.46, rise of 8.2%. Merlin buy out - £1,192.10 on 18/11.     1. **Dividends**   **26.3.4.1** 22/11 Next 15 - £3.72, 1/11 - Smith DS - £22.44.    **4. Homework (Current Portfolio)**  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  ASOS - appointed a Chief Growth Officer (where do i get a job like that!!). Codemasters - working on secret Hollywood game and bought Strictly Mad Studios. Haydale - new CFO and new share buy offer of £450K. Immotion - no news. M&G - sold £1bn closed bonds. Suspended £2,5bn property portfolio. Merlon - Sold. Next 15 - No news. Prudential - Barclays Capital say has 32.7% upswing potential. PurpleBricks - share rise of 4%. last 6 months of year to be flat. RA International - no news. Sirius Minerals - need £3bn . Need £600mn by March 2020. Gov not stepped in. Smith (DS). New contracts with Bloom & Wild. funding a new bags for life study. Sumo - buy rating by Berinberg. Tristar - commercial presentations made. production in full by new year. Versarian - looking at graphene as clothing. share surge of 5% on new contracts. Vodafone - Virgin media have switched to Voda from BT (3 mn customers). Cost reduction via OpenRan platform. new tech venture "wavelength" with Amazon. Volution - buy ratings as they have small and handled debts.  **5. Strategy for New Investment**   1. **New Companies**   **26.5.1.1 -** Discussions abound and decided to purchase £1,000 of Trig Renewables.  **2. Re-investment in Existing Portfolio**  **26.5.2.1 -**  An additional £500 Versarien.  **6. Fantasy Shares**  **Pinned - 24.6.1 -** Agreed to revert to old style. Probably September 2019 meeting. Still to re-start  **7. Peston**  Woman discovered her kitchen entirely wrapped in xmas paper - inc fruit and utensils! fast food customer given receipt with insult typed on "ugly sweater". Girl caught sneaking boys into her sleepover, so dad took over her social media and posted vids of her and proved more popular. meals on wheels unable to deliver food to 70yr old woman, she had been stuck in the bath for 8 days! US company paying $3,000 per month for weed smokers - americanmarijuana.org. folks near Blackhall colliery town in Co Durham keep finding £20 notes in the streets - happened numerous times over the last 20 years. A Dr Wang operated on a 12yr old who stuck 31 small metal balls in his penis. Maine man set up trap on front door with shot gun - guess what - yup, killed himself. 18,000 yr old puppy found in Siberian permafrost. A dog in the US drover round in circles for an hour after putting the automatic in drive. the 3rd 27yr old K-pop star found dead in Seoul in recent months. A rare case of monkeypox identified in Nigeria entered the UK. A wild boar discovered £17K of cocaine is a Tuscan forest. the world's thinnest bikini has been shown. A Canadian bride cancelled her wedding by email, due to guests not paying. she shared the cancellation on Mumsnet and Facebook - she had tried to crowd-source the wedding at a cost of $1500 CDN (£900) each. only 8 guests had RSVP'd.  **8. AOB**  **Pinned - 24.8.1 -** Xmas do - date set 9th November - Sri looking at venues, to accommodate our vegan and vegetarian members. - Al's Wedding is the new Xmas do!  Club memberships - reminder!  **9. Next Meeting**  Wednesday 29th January, 2020 - Al's Wedding doesn't count! 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")**  "the carrots are cooked" - means that the outcome of the situation cannot be changed! | **All**  **NCP**  **NCP**  **All** |