

April 20, 2017 Computerized Investing Meeting Notes:

Ron suggested these securities for purchase:

SWPPX, because:

1. Index fund for S&P 500 from Charles Schwab.
2. Low turnover (2%).
3. Expense ratio much lower than the competing Vanguard fund.
4. Morningstar 4 star rating.

QQQ, because:

1. Better performance than S&P 500.
2. 5 star Morningstar rating.
3. Invests in large growing companies: Apple, Facebook, Microsoft, ... avoiding single stock risk.
4. .02% expense ratio.

CC Chemours, because:

1. 330% momentum in last year.
2. Chemical company with growing sales and earnings.
3. Paying a dividend.

BWEN Broadwind Energy, because:

1. 80% momentum in last year.
2. Other reasons I cannot remember.

Bernard suggested these securities for purchase;

WTI 8.5% 06/15/2019 oil bonds (CUSIP: 92922PAC0) because:

1. The bond yield 18% to maturity.
2. Significant inside ownership and buying of the common.
3. Oil now above 50 a barrel.
4. Improving current ratio.
5. Tracy Krohn, who founded the company, has owned up to 53% of it.

MLPX MLP ETF, because:

1. Pipeline company ETF. Pipeline companies can make lots of money with very few workers once the pipelines are built.
2. Diversified ETF.
3. MLP' s return 90% of what they make to shareholders.
4. By investing in MLP funds you get diversification without having to do a k1.
5. This ETF has a 4 star Morningstar rating.
6. The StockCharts.com/Free charts/Perf Charts momentum is very good.
7. 5.46% yield.
8. Expense ratio: 0.45%.

FB, Facebook, because:

1. Up to 45% growth rate.
2. Leadership by Mark Zuckerberg, 4th richest man in the world.
3. Involved in monetizing many leading edge technologies.
4. Good place for targeting advertisers.

After these recommendations, Ron gave an easy to understand demonstration of Stock Investor Pro.

We also had lots of discussion.

Bernard E. Scoville