Hamilton Investments

Educating Through Portfolio Management
Meeting Agenda

- The Hamilton Global Growth Fund
- Michigan Portfolio Competition
- Basics of Stock Picking
- Events and Speakers
- Odds and Ends
The theme of the portfolio is “What will the world need in 10 years?”

To keep things interesting, each company must be between $300 Billion and $10 Billion

We are looking for companies well positioned to support global growth in key markets and industries

- Examples; companies that own natural resources needed in China, such as oil and timber
- Companies that excel in industries with large barriers to entry; Pharma, Semi-conductors
- Companies that are involved in emerging technologies; Hybrid engines, solar panels

To keep things interesting, each company must be between $300 Billion and $10 Billion market cap

Companies should be ones that are familiar; ones you recognize, have read about in the paper, or have some connection with

Try and think of 2 or 3 and we will compile all of them by sector and then talk about them in the next meeting
Meeting Agenda

• 20- 30 Companies
• All Small and Mid Cap
• Companies in good financial standings and good long term outlook
• Companies not susceptible to regulations like healthcare
• Low Beta’s and “Best of Breed”
Michigan Portfolio Contest

- 100 Top tier schools from around the country
- $100,000 dollars to invest
- 8 weeks from Feb 6\(^{th}\) to April 3rd
- $15 dollar trades
- Equities and Options trading
- Performance tracked by SimuMarket.com
- But most importantly….
Winnings!

- 1<sup>st</sup> Place = $7,000 Cash money = Trip to Vegas

- 2<sup>nd</sup> Place = $3,000 Cash money = Trip to New York

- 3<sup>rd</sup> Place = $2,000 Cash money = One long trip to the VT
The Game Plan

• Big gains = Big risks
• Fewer stocks = More volatility
• Smaller Cap = More growth potential
• Event driven = Good in short term
• It’s not long term results that we are worried about, it’s a quick buck
• It doesn’t matter if we lose all the money…it’s not real anyways
Basics of Stockpicking

• Choosing a Sector…
  o Growth; How is this sector going to grow?
  o Predictability; How has this sector in the past?
  o Profitability; How much money do they make?
  o Status; Which company is the best in the business?
Terms

• Market Cap
• Average Volume
• Price Range
• P/E
• EPS
• Beta
Lastly

• Speaker Suggestions?
• Meeting Time?
• Informational Specialist (Club Secretary)
• Anything else…?