

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

Hamilton Global Growth Fund

- 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 6th to April 3rd
- \$15 dollar trades
- Equities and Options trading
- Performance tracked by SimuMarket.com
- But most importantly....

Winnings!

- 1st Place = \$7,000 Cash money = Trip to Vegas
- 2nd Place = \$3,000 Cash money = Trip to New York
- 3rd 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...?