

## NORCAL WEBINAR

# Online CoreSSG

## The Basics

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## Online CoreSSG: Disclosure

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## Online CoreSSG

### Agenda

- + Advantages of the CoreSSG
- + Before we go online...
- + Let's go online
- + Wrap up

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## Online CoreSSG

BetterInvesting has 2 online stock study tools: the **CoreSSG** and the **SSGPlus**  
Both tools display the same historical data from Morningstar  
Enter your estimates once in either tool; the other uses your same inputs

### Basic Advantages of the CoreSSG:

- + Steps presented one at a time – one screen/step
- + Education/guidance for every step
- + Recommendations for focusing your research
- + Fewer numeric displays
- + You can't get lost in the CoreSSG:  
Forward & back buttons move screens  
in proper sequence

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## Online CoreSSG

+ **The CoreSSG presents 14 steps/screens one at a time**

### 1<sup>st</sup> – Review History: key measures of the company’s past 10 years

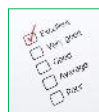
- Sales growth
- Earnings growth
- Price history (with sales and earnings growth)
- Pre-tax profit
- Percent Earned on Equity
- Debt
- Debt to Equity

**If the 1<sup>st</sup> 7 steps looks BAD, QUIT NOW**

**If the history looks GOOD, CONTINUE working on the SSG.**



A screenshot of a rating scale with five options: Excellent, Very good, Good, Average, and Poor. The 'Poor' option is selected with a checkmark. A red stamp is overlaid on the 'Poor' option.



A screenshot of a rating scale with five options: Excellent, Very good, Good, Average, and Poor. The 'Excellent' option is selected with a checkmark.

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## Online CoreSSG

**If the company passes its “history test,” then continue working on the SSG**



**Start/complete your research. Vital. Suggestions, links in the SSG Education panels**

### 2<sup>nd</sup> – Enter your estimates about the company performance during the next 5 years

- Sales growth estimate
- Earnings growth estimate
- High Price/Earnings ratio estimate (to generate potential high price)
- Low Price/Earnings ratio estimate (to generate potential low price)
- Payout estimate (dividends)

### 3<sup>rd</sup> – Evaluate how well might the company’s stock perform over the next 5 years

- Is the stock’s current price in the Buy, Hold or Sell Zone?
- What is the potential upside versus the potential downside (gain versus loss)
- What is the potential total return (stock price appreciation + dividends)

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## Online CoreSSG

### Before We Go Online...

#### Where to find the GDP growth rate and inflation data

[www.tradingeconomics.com](http://www.tradingeconomics.com) > Forecasts > GDP Annual Growth Rate for USA  
> Forecasts > Prices > Inflation Rate for USA

Current forecasts for 2016 to 2020 (posted as of 3/5/16)

	Q1-2016	Q4-2016	2020
GDP Growth Rate:	2.1%	2.9%	2.1%
Inflation Rate	1.0%	1.9%	2.8%

#### Company size and expectations for reasonable performance – Size is based on sales

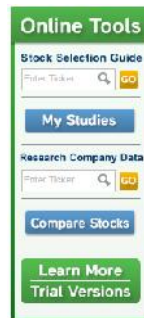
Small company	Annual Sales: < \$1B	Performance: 12%+ growth/year
Medium	Sales: \$1B < \$10B	Performance: 7% - 12%
Large	Sales: >\$10B	Performance: 5%-7%

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## Online CoreSSG

### Questions?

### Now We'll Go Online



← New studies

← Your saved studies

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## Online CoreSSG

### Wrap Up – Check These Out

Pre-defined screens

Tutorials & Quick Start Guides

Reference materials, including FAQ

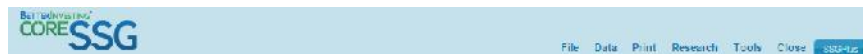


Revision Note March 9, 2016  
The Ticker Heat Map (magnifying glass tab) is available only to SSGPlus subscribers

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## Online CoreSSG

### And These



Data Tab - Refresh study data  
Research - BetterInvesting > Member Sentiment (studies by other BI members)  
Research – Analyst Estimates

If you subscribe to the SSGPlus, access here

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## Online CoreSSG

### **HOMEWORK**

Whaaaat?? *Oh No!* **Oh Yes!**

## **Homework!**

#### **Start doing SSGs**

When you have **completed** 30, you'll feel like a pro  
Remember, you deliberately won't finish every SSG you start

#### **Ideas for practice:**

**Companies at your local shopping center**

**The Dow 30**

**Companies in the S&P 500 whose names start with "M" or "D" or...**

**Small companies in the Pre-Defined Screens**

**Stocks mentioned in the BI magazine repair shop**

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## **Upcoming Events in the NORCAL Area**

#### **Sacramento Area Chapter**

Breakfast with the Champions: March 12, 8 am to noon, Roseville

Ken Kavula (in person) will be the featured speaker

[www.BWTC2016.eventbrite.com](http://www.BWTC2016.eventbrite.com)

#### **San Francisco Bay Area Chapter**

Model Club: April 14, 5:45 pm, San Francisco

<http://www.meetup.com/BetterInvestingSanFranciscoBayAreaChapter/>

#### **Silicon Valley Chapter**

Model Club: April 4, 7:00 pm, Santa Clara

<http://www.meetup.com/Better-Investing-Silicon-Valley-Chapter/>

**Please complete the follow up survey that follows this presentation**

### **Questions**

Contact me at [mar02mic@comcast.net](mailto:mar02mic@comcast.net)

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