

Presentation Check List for MMMC Initial Stock Presentations  
A Guide for Beginners  
(And Those of Us that Tend to Get Long-Winded When Presenting a Stock)

Believe it or not, this whole list can be dealt with in a 4-minute stock report. Keep it short and to the point. If some of the information is unavailable or unclear state that and continue with the report. Remember that almost all of this information will be found on a thoughtfully prepared SSG. Don't get caught up in the "story" but, rather, stick to the fundamentals. If the club likes the stock then that's the time to send it off for further research along with a few of its strongest competitors. When and if it returns to the agenda, more information on its story and its current news will be available, ready to be discussed at length by the entire partnership as it strives to make a really informed stock purchase.

Company Name and Ticker

S&P Industry and Sector from SDS

Brief Description of Company (no more than 20-30 seconds – cut to the core of what the company does with one or two sentences)

Debt to Total Capitalization

Potential Dilution (Preferred Stock, New Stock Issue, Stock Buy-Back Program – do a quick news search)

Most Recent Quarter Trends in Sales and Earnings

Historic Sales compared to Industry Historic Sales

Historic Earnings compared to Industry Historic Earnings

Projections for Sales and Earnings

% Pre-Tax Profit on Sales and Trend compared to Industry % Pre-Tax Profit on Sales

Most recent Debt to Equity compared to Industry Debt to Equity and trend in Debt to Equity (Make use of OPS data and Alt d keys)

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**THE BARBED WIRE FENCE BETWEEN "GOOD COMPANY" AND "GOOD VALUE" – MANY TIMES AN INITIAL PRESENTATION FOR THE STOCKS TO STUDY LIST CAN STOP HERE**

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Historic PE's (Average High, Average, Average Low)

Current PE

High PE going forward

Low PE going forward

Low Price in 5 Years

Buy/Hold/Sell

Upside/Downside

Potential 5 Year Appreciation

Dividend Amount and Yield

Payout Percentage and Trend

Potential Average Return for next 5 years (Make use of Alt-N and Ctrl-Alt-T if using Toolkit 4)

Total Return for next 5 Years (Make use of Alt-N and Ctrl-Alt-T if using Toolkit 4)

Potential problems with company (Lawsuits, SEC inquiries, change in top management, loss of product, increased competition, etc.)