



Bay Area Bulls Investment Club

Minutes for November 15, 2001

Attendees:

Earl Cory, Jim Hickey, David Nakamura, Jeanne Cherbeneau, , Sandra Dellafiora, Dick O'Brien, Ruby Taylor, and John Florence.

Absent:

Robert Weeks

Guests:

Nobody

Location/Time:

David's house, meeting started at 7:10

Minutes Corrections:

Minutes for September were reviewed and accepted after many corrections:

Forgot Jim's report of POS

John's absence

Lily Tomlin

Jeanne (no I)

Treasurer's Report:

John and Earl still done agree on a couple of stocks. Things are up. John passed out annual reports.

Attendance:

Jim reported that we are in good shape; no one is in default.

Contact information:

No changes were noted.

Member News

Sandra and Jeanne had a long discussion on James Joyce.

Jeanne's sister wants to get away from her family and came to visit. They are cleaning house.

Old Business

None

New Business

None

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Stock Selection

David and Jeanne are going to look at Pharmacy Services
Jeanne also would like to look at Security Companies. This lead to a discussion about protection, security, and investment banking.

Financial Report

Ruby forgot, P/E Ratio, continued next month.

Portfolio Review:

CPRT – Jim
Looking very good, in the hold range

EMC, INT – Ruby
Not this month.

LOW - David
Hold range

MERC - Sandra
Nothing new. Most successful online pharmacy. Several drugs coming off patent. Medco seems to be holding them up.

Stock Study

Earl --- Biotech Industry, but nothing very exciting. He reported on Amgen, IDEC Pharm., Immunex, and Med Immune. Only Med Immune is in the buy range with good potential yield. No recommendations were made.

Watch List:

Assignments:

Dick was reminded that he is doing Toll Brothers.
Stock Study Jeanne and David – Pharmacy Services, Security
Financial Report Dick and Ruby
Stock Selection: John and Ruby
Portfolio Review BMET, KLAC – John
 EMC, INTC - Ruby
 ORCL – Earl
 TOL - Dick

Next Meeting: **December 20, 2001; 7:00pm**
Location: **David's Home**
Meeting adjourned: **8:22 pm.**