



*A way to learn  
A way to earn*



## 2<sup>nd</sup> National Investment Clubs Conference ProshareClubs Day 2008

London - 15<sup>th</sup> November 2008

World Money Show

Queen Elizabeth II Conference Centre

St James Suite

# Welcome & Introduction

Mourad Kara

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Treasurer and Webmaster

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[www.mobiusclub.co.uk](http://www.mobiusclub.co.uk)



# A little bit about the Mobius club



- Set up in October 1997
- Based in West Yorkshire
- 4 to 10 members (8M, 2F)
- Average £25-75 per month
- Unit Valuation System
- Current NAV ~£35k
- Use COW2000 for A/C
- Meeting in homes - rotating
- [www.mobiusclub.co.uk](http://www.mobiusclub.co.uk)



Proshare Clubs Award Winner  
2005 and 2006 (runner up 2004  
and 2007)

Aims: to learn, to enjoy; to invest (in that order)

# Focus for this Conference

- Investing in uncertain times ...
- One year on ...



# Outline

- Brief history
- Successes
- Challenges
- Why this event?
- Programme for today



.... "Bulls make money. Bears make money. Pigs get slaughtered".....

# Brief History of Clubs

- Proshare [1992 – 2003]
- From 2005 Ifs Proshare
- *“responsible share-based investment”*
- ProshareClubs [2003 – current]
- *“A way to learn, a way to earn”*

- Estimated ~13000 clubs in the UK
- Estimated ~500 new clubs in 2008

The logo for dti (Department for Trade and Industry) in a lowercase, bold, sans-serif font.The logo for CBI (Confederation of British Industry) with the tagline 'THE VOICE OF BUSINESS' below it.The logo for Digital Look, featuring two squares (one dark blue, one light blue) to the left of the text 'Digital Look'.

## New clubs registered in

- 1998: 162
- 1999: 1543
- 2000: 3946
- 2001: 1112
- 2002: 322

# Recent Successes

- Popular to set-up clubs in the UK
- Not difficult to set up clubs
- Good tools, support & guidelines
- Proshare manuals, toolkits, forums, meetings, conference
- Light touch - rules, constitutions, legal entity and taxation
- Large number of clubs in UK
- Now clubs with large NAVs: £1M+

*... Friendly collective investment ...*

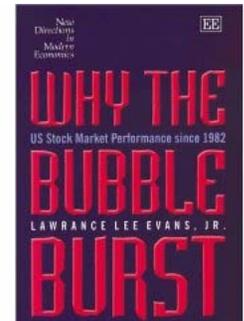


## Typical objectives

- Learn,
- Invest,
- Socialise,
- Return on investment

# Recent Challenges

- Current financial turmoil
- Y2k bubble burst & market collapse
- Loose interest when market down
- Divergence in investment strategies
- Members apathy - very busy
- Core members doing bulk effort
- Voluntary basis structure



Remember the 2003 rally!

FTSE 100: 1996-2008



# Why this Event?

- Want to meet other investment clubs?
- What other investment clubs are up to?
- Encourage private investors to form/join clubs
- Investment club-led meetings
- Experienced club members share their best practice, mistakes & lessons learnt
- Very good feedback from last year first conference



Succeed together

# Programme for today

We have some great activities for you:

- **Great presentations – hot topics**
- **Very informative Q&A Panel session**
- **Tutorials / clinic**
- **Quiz**
- **Prize draws**
- **Drink reception**



# Speakers Affiliations

**Ab Initio  
Investment  
club**

**Crown Cycling  
Circle  
investment  
club**

**Dynamic  
investment  
club**

**ProshareClubs**

**Fairer shares  
investment  
club**

**Millennium  
Materialists  
investment  
club**

**Mobius  
investment  
club**

**Timetotrade**

**PIP investment  
club**

**Rolling Stocks  
investment  
club**

**Sensatus  
investment  
club**

**Investors  
Chronicle**

# Schedule for today

10:20-11:00	Making profits and taking profits	Ian Head (PIP)
11:00-11:40	On year on: Top tips for starting and sustaining an investment club	Peter Salenieks (Dynamic) & Bela Tiwari (Ab Initio)
11:40-12:00	Coffee/tea break - Clubs get networking!	
12:00-12:40	Is equal share really fair?	Dave Gaskell (Rolling Stocks)
12:40-13:20	Tax doesn't have to be taxing	Dary McGovern (Timetotrade)
13:20-14:40	Lunch break – Tutorials/clinic for treasurers	
14:40-15:20	The forces that influence the global economy	David Stevenson (Investors Chronicle)
15:20-16:00	More wine sir?	Chris Rose (CCC)
16:00-16:40	Why we are all just headless chickens	Paul Dolman-Darrall (Fairer shares)
16:40-17:30	Investment club Panel Session – Clinic Session	Chaired by Nick Louth (Investors Chronicle)
17:30-18:30	Prize draws and drink reception	ALL

# Prizes

➤ **Technical Analysis training course with Michael Hewson for 2 people (Digital Look)**

➤ **Subscription to Timetotrade's premium investment club accounting tools**

➤ **Subscription to Market Stars - the stock picking tool (Digital Look)**

➤ **Year's subscription to Investors Chronicle magazine**

➤ **Signed copy of Nick Louth's latest book in the Bernard Jones Diaries**



# Thank you

- Sit back - Enjoy – Relax
  - Ask plenty of questions
  - Got any questions for the panel?
  - Remember the quiz and prizes
  - Tell us what you think.
- 



## Resources Location:

<http://www.mobiusclub.co.uk/>

<http://www.timetotrade.eu/>

<http://www.proshareclubs.co.uk/>

tabs: [Community/Seminar]



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