

MILLBURN AAI INVESTMENT EDUCATION GROUP MEETING

WHEN: Thursday, October 4, 2018

TIME: **REGISTRATION:** 6:45 p.m.
 LECTURE: 7:00 - 8:30 p.m.

COST: Free \$5.00 Donations to Millburn Library appreciated

WHERE: Millburn Public Library 200 Glen Ave. Millburn, NJ 07041

TOPIC: Investing at the Intersect of Value, Momentum and Quality

PRESENTATION DESCRIPTION

Attendees will learn from Charles Rotblut's presentation:

- The useful guidelines that academic theory and the financial industry offer
- How value and momentum can be used to beat the market
- Five criteria to judge a stock's underlying quality

SPEAKER: Charles Rotblut, CFA
Vice President and Financial Analyst, AAI; Editor, AAI Journal

Charles is a vice president and financial analyst at AAI. He is the editor of the *AAI Journal*, created VMQ Stocks, co-created *AAI Dividend Investing*, helps to manage the Stock Superstars Report portfolio and authors the weekly AAI Investor Update email. Rotblut regularly speaks to the media, including CNBC, Kiplinger's and Money. He is also a regular guest on MoneyLife with Chuck Jaffe and a Wall Street Journal expert panelist.

Rotblut holds the Chartered Financial Analyst designation and has analyzed both publicly traded and privately held companies. His experience includes working for Zacks Investment Research; INVESTTools, an investment education company; Curian Capital, a money management firm; and McClure, Schumacher & Associates, a business valuation firm.

Charles' book, "[Better Good than Lucky: How Savvy Investors Create Fortune with the Risk-Reward Ratio](#)," was published in November 2010.

THE MEETING IS OPEN TO ALL AAI MEMBERS, THEIR FAMILY AND FRIENDS

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