



# 2009 ANNUAL CLUB SURVEY SUMMARY DATA

BETTERINVESTING - Puget Sound Chapter

ALL INFORMATION BASED ON THE NUMBER OF CLUBS THAT RESPONDED

Not all clubs responded to all questions.

Values were calculated using the closing price / share for April 30, 2009 as reported by Yahoo!

CLUB TOTALS AS REPORTED			CHAPTER AVERAGES		
Clubs Reporting	23.5%	77		<u>Average</u>	<u>Median</u>
All Men Clubs	3.9%	3	Number of Members in Club	10.6	10.0
All Women Clubs	59.7%	46	Club Age (years)	14.9	12.0
Mixed Clubs	35.1%	27	Monthly Investment per Member	\$56	\$40
Clubs in Chapter		327	Est. Portfolio Value / Club	\$51,753	\$32,068
Total Members	23.9%	815	Est. Cash on Hand / Club	\$4,045	\$2,388
Men	25.6%	209	Number of Stocks / Club	13.4	13.0
Women	74.4%	606			
Club Members in Chapter		3,407			

CLUB AGE BREAKDOWN				CLUB SIZE BREAKDOWN			
New	0	10 - 11 years	17	1 - 5 members	5	21 - 25 members	3
1 year	0	12 - 13 years	19	6 - 10 members	36	26 - 30 members	0
2 years	2	14 - 15 years	5	11 - 15 members	27	31 - 40 members	0
3 years	1	16 - 20 years	7	16 - 20 members	5	Over 40 members	0
4 years	0	21 - 30 years	8	Largest Club	24	Smallest Club	2
5 years	1	31 - 40 years	1				
6 - 7 years	4	Over 40 years	4				
8 - 9 years	6	Oldest Club	54 years				

## REGIONAL ESTIMATES

Total Investments	\$16,923,334
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(Total # chapter clubs) x (Average Portfolio Value)

Monthly Investment	\$194,664
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(Total # Chapter Clubs) x (Aver. Monthly Dues Collected)

## Top 50 Companies Held by Puget Sound Clubs (By Number of Clubs)

Rank	Company	Ticker	Clubs	Shares	Total Value
1	Microsoft	MSFT	43	12,561	\$254,476
2	Starbucks	SBUX	40	9,400	\$135,924
3	Costco Wholesale	COST	33	3,257	\$158,294
4	Stryker	SYK	32	4,592	\$177,775
5	General Electric	GE	30	4,738	\$59,939
6	Johnson & Johnson	JNJ	22	2,363	\$123,719
7	Fastenal	FAST	21	2,576	\$98,802
8	AFLAC	AFL	18	2,367	\$68,373
9	Expeditors International	EXPD	17	2,854	\$99,078
10	Walgreen	WAG	15	1,431	\$44,975
11	Danaher	DHR	13	2,249	\$131,419
12	Teva Pharm	TEVA	13	1,493	\$65,513
13	Apple Computer	AAPL	13	320	\$40,266
14	Cisco Systems	CSCO	13	1,613	\$31,163
15	Infosystem	INFY	12	3,416	\$105,251
16	PepsiCo	PEP	12	1,340	\$66,702
17	Coach	COH	11	2,664	\$65,268
18	Paychex	PAYX	11	2,328	\$62,890
19	Medtronic	MDT	11	1,360	\$43,529
20	Boeing	BA	10	418	\$16,729
21	Procter & Gamble	PG	9	1,101	\$54,433
22	Bed Bath & Beyond	BBBY	9	1,667	\$50,710
23	Garmin	GRMN	9	1,174	\$29,563
24	Fiserv	FISV	8	1,133	\$42,284
25	Factset	FDS	8	682	\$36,561
26	Wells Fargo	WFC	8	890	\$17,807
27	Nokia	NOK	8	779	\$11,021
28	Pfizer	PFE	8	649	\$8,671
29	Wal-Mart Stores	WMT	7	381	\$19,202
30	Intel	INTC	7	1,194	\$18,834
31	eBay	EBAY	7	1,062	\$17,491
32	Walt Disney	DIS	7	596	\$13,052
33	Noble	NE	6	1,555	\$42,498
34	Caterpillar Inc	CAT	6	1,122	\$39,921
35	3M Co	MMM	6	685	\$39,456
36	Home Depot	HD	6	1,166	\$30,693
37	Staples	SPLS	6	1,128	\$23,263
38	Cognizant Technology	CTSH	6	815	\$20,204
39	Amgen	AMGN	6	408	\$19,776
40	United Parcel Service	UPS	6	298	\$15,597
41	Berkshire Hathaway (Cl B)	BRKb	5	8	\$24,520
42	United Technologies	UTX	5	490	\$23,932
43	Manitowoc	MTW	5	2,240	\$13,328
44	McDonald's	MCD	5	246	\$13,109
45	Chesapeake Energy	CHK	5	591	\$11,653
46	Harley-Davidson	HOG	5	227	\$5,033
47	Bank of America	BAC	5	215	\$1,920
48	Transocean	RIG	4	574	\$38,734
49	Oracle	ORCL	4	1,600	\$30,944
50	Quality Systems	QSII	4	515	\$27,614

## Top Holdings of Puget Sound Clubs

Company	Clubs	Shares	Value	Company	Clubs	Shares	Value
3M Co	6	685	\$39,456	Chesapeake Energy	5	591	\$11,653
AAR Corp	1	240	\$3,617	Chevron-Texaco	1	100	\$6,610
Abbott Laboratories	2	326	\$13,623	Chico's FAS	2	187	\$1,429
Abercrombie & Fitch	1	50	\$1,353	China Clean Energy	1	200	\$40
Adobe Systems	1	45	\$1,231	China life	1	33	\$1,747
AFLAC	18	2,367	\$68,373	China Telephone	3	242	\$10,445
Agilent Technologies	1	74	\$1,351	Cisco Systems	13	1,613	\$31,163
Airgas	2	135	\$5,809	Citigroup	2	134	\$408
Allied Capital	1	274	\$674	Clean Energy Fuels	2	200	\$1,692
Allied Irish Banks PLC	2	150	\$345	Coach	11	2,664	\$65,268
Altria Group	1	100	\$1,633	Cognizant Technology	6	815	\$20,204
Amazon.com	1	100	\$8,052	Coldwater Creek	1	100	\$345
America Movil SA	3	988	\$32,456	Colgate-Pamolive	2	257	\$15,137
Americab Bio Engr	1	200	\$848	Columbia Banking System	2	350	\$3,465
Amgen	6	408	\$19,776	ConocoPhillips	2	91	\$3,743
Apache	2	125	\$9,094	Corinthian Colleges	1	420	\$6,474
Apple Computer	13	320	\$40,266	Corning Inc	3	2,300	\$33,626
Applied Industrial Tech	1	100	\$2,250	Corporate Executive	1	300	\$5,184
Applied Material	1	655	\$7,998	Costco Wholesale	33	3,257	\$158,294
Arcelormittal	1	51	\$1,210	CVS Corp	1	188	\$5,975
Archer Daniels Midland	3	163	\$587	Cypress Semiconductor	1	150	\$8
Artisan Fund	1	117	\$1,750	Danaher	13	2,249	\$131,419
Asco Brown Bavaria	1	80	\$1,138	Darden Restaurants	2	125	\$4,621
Automatic Data Processing	2	208	\$7,318	Deere & Co	2	40	\$1,650
Avery Dennison	1	109	\$3,145	Dendreon	2	300	\$6,360
Bank of America	5	215	\$1,920	Devon Energy Corp	2	140	\$7,259
Barron Growth Fund	1	90	\$2,956	Diageo	2	109	\$5,216
BB&T	1	100	\$2,345	Diamond Offshore Drilling	1	500	\$36,205
Bed Bath & Beyond	9	1,667	\$50,710	Diebold	3	301	\$7,949
Bentley Dickinson	1	150	\$9,072	Dodge & Cox international	1	146	\$3,271
Berkshire Hathaway (Class B)	5	8	\$24,520	Dynamic Material	2	325	\$5,213
Best Buy	1	30	\$1,151	Eaton Vance	1	175	\$4,790
BHP Billinton LTD	2	262	\$12,601	eBay	7	1,062	\$17,491
Black Rock Debt Str	1	1,062	\$2,612	EMC	1	130	\$1,629
Blackstone Group	1	50	\$2,471	Emerson	2	130	\$4,425
Boeing	10	418	\$16,729	Empire Dist Elec	1	100	\$133
BP	3	292	\$12,394	Evolution Solar	1	200	\$164
Bristol-Myers Squibb	1	100	\$1,920	Exped International of Wa	17	2,854	\$99,078
British Petroleum	1	37	\$1,571	Exxon Mobil	1	15	\$1,000
Buffalo Small Cap Fund	1	139	\$2,556	Factset	8	682	\$36,561
Build a Bear	1	100	\$546	Fastenal	21	2,576	\$98,802
Cameco	1	100	\$2,279	FBR Small Cap Financial	1	286	\$3,983
Canadian Nat'l RR	2	79	\$3,193	FedEx	3	150	\$8,417
Cannon	1	75	\$2,266	Fidelity International Grwoth	1	356	\$8,027
Carlisle	1	69	\$1,570	Fiserv	8	1,133	\$42,284
Carnival	1	100	\$2,688	Flextronics International	1	330	\$1,280
Catalyst Health	2	250	\$5,638	Flir System	3	140	\$3,105
Caterpillar Inc	6	1,122	\$39,921	Flow International	1	500	\$910
Celgene	1	30	\$1,282	Flowserve	1	30	\$2,037
Cemex	4	290	\$2,169	Ford Motor	3	598	\$3,576
Ceradyne	1	200	\$3,448	Fortune Brands	1	474	\$18,633

## Top Holdings of Puget Sound Clubs

Company	Clubs	Shares	Value	Company	Clubs	Shares	Value
Fossil	1	2,000	\$40,320	Linear Technology	1	200	\$4,356
Freeport McMoran	1	600	\$25,590	LJ International	1	100	\$107
Frontier Communication	1	200	\$1,422	LKQ CP	1	200	\$3,396
Frontier Financial Corp	1	400	\$568	Lord Abbett Small Cap	1	251	\$2,730
Fuel Tek	2	408	\$844	Lowe's	4	224	\$4,805
Gamestop CP	3	145	\$4,373	Manitowoc	5	2,240	\$13,328
Garmin	9	1,174	\$29,563	Marathon oil	1	100	\$2,970
Genentech	4	129	\$12,251	Marvel Technologies	2	136	\$1,493
General Dynamics	1	75	\$3,875	McDonald's	5	246	\$13,109
General Electric	30	4,738	\$59,939	MDU Resources Group	1	448	\$7,880
Gilead Sciences	3	650	\$29,770	Medco Health Solutions	1	100	\$4,355
Global Sources	2	509	\$2,267	Medtronic	11	1,360	\$43,529
Google	2	22	\$8,711	Microsoft	43	12,561	\$254,476
Graco	1	75	\$1,769	Mindray Medical	1	80	\$1,826
Green Mountain	1	50	\$3,616	Monsanto	2	80	\$6,800
Halliburton	2	350	\$7,077	Mosaic	1	25	\$1,011
Hansen Natural	1	78	\$3,185	Motorola	1	100	\$553
Harley-Davidson	5	227	\$5,033	MSC Industrial	1	200	\$8,170
Harris Corp	2	125	\$3,823	MTS Systems Corp	1	50	\$1,057
Herbalife	1	1,500	\$29,730	National Oilwell Varco	3	1,350	\$40,878
Hewlett-Packard	2	106	\$3,814	Natural Gas Services	1	100	\$395
Hibbett Sporting Goods	1	90	\$1,877	Neogen	1	187	\$4,239
Holly Corp	1	50	\$1,048	Netflix	3	180	\$8,156
Hologic	3	400	\$5,944	Nike (Class B)	2	153	\$8,005
Home Depot	6	1,166	\$30,693	Noble	6	1,555	\$42,498
Honeywell International	1	50	\$1,561	Nokia	8	779	\$11,021
HongKong Shangai Hotels	1	500	\$400	Norfolk Southern	1	100	\$3,568
Huron Consulting	1	75	\$3,596	Northwest Pipe	1	100	\$3,793
Illinois Tool Works Inc	4	257	\$8,430	Nucor	2	175	\$7,121
Infosystem	12	3,416	\$105,251	NVIDIA	1	100	\$1,148
Intel	7	1,194	\$18,834	NYSE Euronext	1	70	\$1,622
IBM	1	50	\$5,161	Occidental Petroleum	1	200	\$11,286
Intrepid Potash	1	65	\$1,601	Omnicom Group	1	398	\$12,515
Intuit	2	226	\$5,227	optionsExpress	1	1,900	\$31,274
iShares MSCI EAFE Index	1	54	\$2,265	Oracle	4	1,600	\$30,944
iShares MSCI Switzerland	1	104	\$1,685	PACCAR	3	545	\$19,315
ITT Educational Services	1	10	\$1,008	Pactiv	1	200	\$4,372
J 2 Global Communications	1	2,400	\$57,576	Panera Bread	1	25	\$1,400
J.P. Morgan Chase	1	60	\$1,980	Paychex	11	2,328	\$62,890
Jack Henry	3	1,132	\$20,396	Peabody Energy	2	69	\$1,821
Jacobs Engineering	2	71	\$2,701	PepsiCo	12	1,340	\$66,702
Johnson & Johnson	22	2,363	\$123,719	PetMed Express	3	285	\$4,634
Johnson Controls	1	1,000	\$19,010	Petroleo Brasileiro	1	30	\$1,007
Kinetic Concepts	1	1,200	\$29,712	Pfizer	8	649	\$8,671
Knight Transportaion	2	240	\$4,243	Philip Morris	1	100	\$3,620
Kohl's	3	150	\$6,803	Potash	4	132	\$11,417
Kraft Foods	3	351	\$8,213	Powershares Food & Bevge	1	102	\$1,295
L-3 Communications Holding	3	295	\$22,464	Powershares QQQ	1	287	\$9,824
Laboratory Corp of A	1	24	\$1,540	Precision Castparts	2	530	\$39,676
Liberty Media Intntll Corp A	1	2,300	\$37,927	Procter & Gamble	9	1,101	\$54,433
Lincare Holdings	2	976	\$23,551	Public Storage	1	32	\$2,140

## Top Holdings of Puget Sound Clubs

Company	Clubs	Shares	Value	Company	Clubs	Shares	Value
Qualcom	4	159	\$6,729	Vang. Total International Stock	1	449	\$4,753
Quality Systems	4	515	\$27,614	Vanguard Emerging Markets	1	215	\$5,963
Raven Industries	1	97	\$2,318	Vanguard Extended Mkt Ide	1	289	\$9,477
Renewable Energy	1	469	\$4,315	Vanguard REIT	1	172	\$1,825
ResMed	1	100	\$3,845	Varian Medical Systems	1	75	\$2,503
Ritchie Bros. Auction	1	617	\$13,821	Veolia Environmental	1	50	\$1,366
Roper Industries	3	161	\$7,340	Verizon Communications	2	75	\$2,276
S&P Depository Receipts	1	99	\$8,690	Visa	3	140	\$9,094
Salesforce.com	2	90	\$3,853	Volcom	1	160	\$2,158
SAP	2	76	\$2,881	Walgreen	15	1,431	\$44,975
Sasol Ltd	1	70	\$2,108	Wal-Mart Stores	7	381	\$19,202
Schering-Plough	1	301	\$6,918	Walt Disney	7	596	\$13,052
Schlumberger	2	115	\$5,634	Washington Mutual	1	200	\$22
Seattle Genetics	1	100	\$923	Waste Connection	2	260	\$6,703
Simpson manufacturing	1	50	\$1,113	Waters	1	100	\$4,417
Sirius Satelite Radio	1	188	\$73	Websense	1	200	\$3,566
Smith International	2	75	\$1,939	Wellpoint Inc	2	225	\$9,621
Smuckers	1	100	\$3,940	Wells Fargo	8	890	\$17,807
Southern Copper	3	332	\$6,165	Westpac Banking	1	25	\$1,724
Southwest Airlines	3	236	\$1,649	Westport Innovations	1	100	\$504
SPDR Industrial Sector	1	101	\$2,198	Who's Your Daddy	1	104	\$5
St. Jude Medical	1	100	\$3,352	Wipro Ltd ADS	1	100	\$938
Stanley Works	1	100	\$3,803	Woodward Gov.	1	200	\$3,992
Staoill ASA	1	100	\$1,860	Yahoo!	2	200	\$2,858
Staples	6	1,128	\$23,263	Yum! Brands	3	466	\$15,551
Starbucks	40	9,400	\$135,924	Zebra Technologies	2	330	\$7,013
Stericycle	3	220	\$10,358	Zimmer Holdings	3	107	\$4,707
Stryker	32	4,592	\$177,775	ZUMIEZ	3	157	\$1,892
Sun Hydraulics	1	450	\$8,145				
Sunpower	2	263	\$7,201				
Suntech Solar	2	321	\$4,789				
Superior Energy Services	1	300	\$5,763				
Sysco	3	525	\$12,248				
T. Rowe Price Group	1	150	\$5,778				
Target	2	100	\$4,126				
Techne	2	300	\$17,166				
Teleflex	1	174	\$7,461				
Telus Corp	2	302	\$7,018				
Teva Pharmaceutical Ind	13	1,493	\$65,513				
Textron	1	108	\$1,159				
Thor Industries Inc	1	50	\$1,150				
Tidewater Inc	1	51	\$2,185				
Total S A Sponsored ADR	3	251	\$12,480				
Total Systems Services	1	696	\$8,679				
Toyota Mtr Corp	2	76	\$6,016				
Transocean	4	574	\$38,734				
Union Pacific RR	1	50	\$2,457				
United Parcel Service	6	298	\$15,597				
United Technologies	5	490	\$23,932				
Universal American Finan	1	860	\$32,043				
Vaalco Energy	1	350	\$1,670				

	Puget Sound Chapter Investors Education Conference	November 20-21, 2009	Meydenbauer Center Bellevue WA
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<b>Club Portfolio Winners</b>		
<b>1st Prize</b>	<b>Visionary Investment Planner</b>	<b>Winning clubs were awarded 2 for 1 admissions to the 2009 Puget Sound Investors' Education Conference</b>
<b>2nd Prize</b>	<b>15-20 Investment Club</b>	
<b>3rd Prize</b>	<b>DATA of Seattle</b>	

*BetterInvesting is a non-profit organization providing investment information, education and support that empowers members to become successful, lifetime investors. Founded in 1951, BetterInvesting has provided investment education to more than five million people and is a charter member of the World Federation of Investors, which provides investment education in over 17 countries worldwide. For information visit [www.betterinvesting.org](http://www.betterinvesting.org) or call 877-ASK-NAIC (877-275-6242).*

<b>SURVEY HISTORY AND SUMMARY</b>										
	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Clubs Contacted	327	366	431	736	676	874	1045	1202	1308	1342
Responses	77	93	113	136	157	172	249	260	352	408
% Reporting	23.5%	25.4%	26.2%	18.5%	23.2%	19.7%	23.8%	21.6%	26.9%	30.4%

<b>NOTES</b>	
•	Companies and data reported in this survey are for educational information only and no recommendation for purchase is implied or intended.
•	The Holdings listed are those valued in excess of \$1000, or more than 100 shares.
•	Values were calculated using the closing price/share for April 30, 2009 as reported by Yahoo.
•	All information provided by club contacts is kept confidential.

This survey report was prepared by Puget Sound Chapter Board Members Diane Ellison, Jim Thomas, and Gary Ordway



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**2009**

**ANNUAL CLUB SURVEY**

**Thank you to the 77 Club Contacts who participated in this year's survey!**