

The Tech Investor's Playbook

The dos & don'ts for investing in tech stocks from a top Wall Street Pro

Summary:

Interested in learning how to make money in tech stocks? Technology stocks comprise 43% of the weight of the S&P 500. 8 of America's 10 largest companies by market cap are tech firms. Whether you have no knowledge of investing in tech stocks or are a relatively experienced investor, this class covers a wide range of topics that can help you make money by investing in tech stocks.

Topics:

- Tech's position in the financial markets.
- Investment strategy. Buy & sell discipline.
- Screening for tech Ideas.
- Investment trends.
- Fundamental analysis.
- Technical analysis to time & pace trades.
- Best free online data sources.
- Key valuation metrics.
- Going global.
- Regulatory constraints on tech companies.
- Private vs public investing.

What you'll learn:

You will learn from a highly experienced Wall Street professional the basics of how to invest in tech stocks, what to look for when searching for investment candidates, and how to monitor your holdings.

Prerequisites:

There are no prerequisites. Just bring a keen interest in tech investing & making money.

About your "teacher":

Paul Meeks is the Co-Chief Investment Officer at [Harvest Portfolio Management](#) in Charleston. He manages the Meeks-Harvest Tech Portfolio. Paul has been an equity analyst, portfolio manager, research director, or chief Investment officer since 1987. He has focused solely on tech Investing since 1992. He created, launched, & managed the world's largest (\$8 billion assets under management) tech mutual funds franchise for Merrill Lynch Investment Managers. You can watch "Tech Tune-Up with Paul Meeks" weekly on Benzinga's YouTube channel or read "Meeks's Musings" in the [Charleston Mercury](#). Paul is also the Professor of Practice in the Accounting & Finance Department in the [Citadel Baker School of Business](#).

Paul has BAs in Political Science & History from Williams College & an MM (MBA) from the Kellogg School of Management where he specialized in finance. He is a Chartered Financial Analyst & a Chartered Alternative Investment Analyst. Connect with Paul Meeks on [LinkedIn](#).

Vitals:

Cost:	\$50 (\$40 CDC members)	Difficulty: Beginner
Class start time:	2:00 pm	Computer: Not required
Class length:	2 hours	Scholarships: n/a
Class size:	40 persons	

Location: 4 Conroy Street, Suite A, Charleston, SC 29403

Parking: Charleston Tech Center Garage