

INVESTMENT FORUM AGENDA FOR WEDNESDAY, OCTOBER 9, 2013, 11:50AM

The Forum will meet at 11:50AM on Wednesdays through November 6

Market Perspective. Markets reacted calmly to the government shutdown this week, and the fast approaching need to raise the debt ceiling. The DOW (with three new members) was down 1.2%; the S&P was essentially even, and the NASDAQ was up 0.7%.

Will markets continue to be calm?

"Investing. A Lifelong Learning Experience."

Tom Crooker will share with us his lessons learned from his vantage point as an investor for many years, and a third generation Crooker investor .

ETF of the Week. With healthcare very much on everybody's minds these days (and always on the minds of OLLI members) let's look under the hood of the Healthcare Select SPDR ETF (XLV) - what is in it, and how it has performed compared with broader markets.

Upcoming Meetings.

A volunteer to be the moderator for the October 23 meeting is still open. We have some topics, and I can prepare the agenda document.

On October 23, Maury Cralle will talk about Ford Motor Company (F.) Maury discussed Ford several years ago; how has F changed as an investment? Perhaps Tesla (TSLA) could also be discussed. Is Tesla a car company or an electronics and battery technology company?

Several Tesla buys have appeared on the Buy/Sell list. Any of you TSLA buyers interested in talking about it? Or those of you who have looked at Tesla but decided not to buy?

We are looking for 4 panelists for a panel on October 30, on when to sell stocks.

Buys and Sells.

Buys

Lear (LEA)
Tesla Motors (TSLA)
Magna International (MGA) - auto parts
IBM (IBM)
First Eagle Global Fund (SGENX)
Darden Restaurants (DRI)
Abbott (ABT)
Wells Fargo Corp (WFC)
PNC Financial (PNC)
(BOND) - 2 buys
Boeing Corp (BA)
A. O. Smith (AOS)
Gilead Sciences (GILD)
Blackrock India (BIIN) - ?
JC Penney (JCP)
Transocean (RIG)
Vanguard Large Cap ETF (VV)
Direxion Daily Gold Miners Bull 3x (NUGT)
Kimberly Clark (KMB)

Sells

Epiq Systems (EPIQ)
Diamond Foods (DMND)
Novartis (NVS)
Wellpoint, Inc (WLP)
Technology Select SPDR ETF (XLK) - covered call option exercised
National Oilwell Varco, Inc. (NOV)
Micros Systems (MCRS)
IBM

Thinking About . . .

3D Systems (DDD)
JC Penney (JCP)
Noodles and Company (NDLS)
First Trust Cloud Computing Index ETF (SKYY)
Merck (MRK)

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