

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, JUNE 24, 2015, 11:50AM,  
Fellowship Hall, Lord of Life Lutheran Church**

The Summer Term will meet 11:50AM to 1:15PM, on June 24, July 1, July 15 and July 22 at Lord of Life Lutheran Church, 5114 Twinbrook Road, Fairfax

**Market Perspective.** Markets were up for the week. The DOW was up 0.7%; the S&P was up 0.8%; and the NASDAQ was up 1.3%. Chinese stocks have pulled back, after their sharp run-up this year, and, of course, we have the never-ending Greek debt crisis, and whether there will be a “Grexit” from the EU.

**Dividend Investing.** This week, we will have a panel discuss Josh Peters’ newsletter, “Morningstar Dividend Investor,” which many of you receive each month. It will follow our discussion last week on dividend investing. The July MDI Newsletter, which I forwarded on Friday to those of you in the distribution list, included a discussion of many of the same points that we talked about last week. The Panel members will be Brenda Bloch-Young, Ed Swoboda, Lou Coglianese, and Sylvia Auton, a new Forum member attending her first session. Among the topics the panel may address are:

- What you think of the stock selection criteria used in MDI?
- How do your view the historical performance of the MDI Dividend Select portfolio (now a combination of the former Builder and Harvest Portfolios)?
- Do you use MDI in your own portfolio and investment decisions?
- At the end of the day, how do you decide to buy and sell dividend paying stocks?

***Buys and Sells (week of June 17)***

Buys

FireEye (FEYE) - 2 buys. Technology security. MC: \$8B

Fortinet, Inc. (FTNT) - technology security. MC: \$7B

Hewlett Packard (HP)

Fastenal (FAST)

GoPro (GPRO)

Centene (CNC) - healthcare services. MC: \$10B

Momenta Pharmaceuticals (MNTA) - biotech. MC: \$1B

Sells

Union Pacific (UP)

Thinking About . . .

AOL (AOL)

General Electric (GE) - sell

Altria (MO) - sell

ALPS Medical Breakthroughs ETF (SBIO)

**Forum Moderator(s) needed July 15.** Sy Sherman will be Moderator on July 22, and he will discuss the Verizon-AOL deal. I can help prepare and distribute the agendas.

### **Forum Resources**

**Investment Forum Website.** The Investment Forum has its own website, [www.olligmu.org/~finforum](http://www.olligmu.org/~finforum). Or the OLLI website, [www.olligmu.org](http://www.olligmu.org), and from the Main Menu, click on “Clubs, Group Blogs, and Ongoing Activities,” and then “Investment Forum.” The current agenda and previous agendas are posted, as well as articles in the financial press that members recommend.

**Morningstar Dividend Investor.** This newsletter comes out monthly, has a model portfolio of dividend-paying stocks and extensive current analyses of dividend stocks and perspectives on the market. A number of Forum members are avid readers of the newsletter. I will advise how you can receive copies of the newsletter.

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