

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, November 18, 2015, 10:30AM,  
Tallwood, TA-1**

**The Investment Forum will meet on November 18, December 2, 9, and 16, and  
January 6 and 13, at 10:30AM, at Tallwood. These are “club” meetings;  
registration is not required.**

**Brenda Bloch-Young will be Moderator this week.**

***Market Perspective.*** Markets were down sharply for the week: the DOW was down 3.7%; the S&P down 3.6%; and the NASDAQ down 4.3%. The likelihood of a Fed interest rate increase, global growth concerns, and disappointing retail sector earnings and projections drove markets. Oil and commodity prices continue to be weak. And markets closed before the Paris terror attacks. Fasten your seatbelt on Monday morning!

***Topics.*** Brenda Bloch-Young and Alan Glenn will discuss the following:

Follow-up on taxes and your portfolio presentation, including investments, allocations, and strategies that fit best in taxable or tax-advantaged portfolios. Questions are invited.

Take-aways from a symposium at Museum of American Finance, held last week in New York City.

Take-aways from a presentation from Cliff Asness, who runs a hedge fund based on momentum trading, held at the GMU Arlington campus last week.

The Buy/Sell list.

***Future Topics.***

***Sector Rotation.*** Gloria Loew will discuss sector rotation, and an ETF, Powershares DWA Tactical Sector Rotation (DWTR), on December 16.

***Airlines.*** James Dann will talk about airlines and airline stocks on December 9.

***Investment Forum 2016 Market Predictions.*** On our last session of the year, December 16, we will take our annual vote on what Mr. Market will do in 2016.

## ***Buys and Sells (week of November 11)***

### Buys

Visa (V)

Gilead (GILD) - 2 buys

IShares Preferred Stock ETF (PFF) - 2 buys

Plains All American Pipeline (PAA)

MarkWest Energy Partners (MWE)

Enterprise Products Partners LP (EPD)

Twitter (TWTR)

Amazon (AMZN)

Paypal (PYPL)

IBM (IBM)

### Sells

Macy's (M)

Amazon (AMZN) - "should I?"

Chevron (CVX)

Baxter (BAX) - after Baxalta (BXLT) spin-off

### Thinking About . . .

Paypal (PYPL)

Wells Fargo (WFC)

Verizon (VZ)

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