

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, FEBRUARY 3, 2016, 11:50AM,
Fellowship Hall, Lord of Life Lutheran Church**

The Winter Term will run through February 10, 11:50AM to 1:15PM, at Lord of Life. There may be a “make up” session on February 17. The Forum will then meet as a “club” from to March 16, 10:30AM to 12 Noon, at Tallwood. No registration is needed for club sessions.

Market Perspective. Another volatile week, with a big Friday rally that pulled markets up for the week - DOW up 2.3%; S&P up 1.8%; and NASDAQ up 0.5%. Markets continue to be driven by the price of oil, which makes little sense. Interest rates have fallen again (has the Fed lost its mojo?) which have hurt bank stocks but helped utilities.

Since “Snowzilla” cancelled our session last week, we will have last week’s agenda this week.

Sharing Lessons Learned. Ludwig Benner will lead a discussion of lessons learned - good and bad - over many years. Among topics:

- Successful and unsuccessful strategies buying and selling investments.
- Selection criteria that worked and didn’t.
- Stage of life changes in goals and investment objectives.
- Investment advisors.

Bragging, lamenting, or just venting are all welcome.

Market Picks. Brenda Bloch-Young will share market picks from an Investment Advisor from Fifth Third Bank, that she ran into while on vacation.

Buys and Sells (week of January 20)

Buys

Financial Sector SPDR ETF (XLF) - add to
iShares Core S&P 500 (IVV)

Apple (AAPL)

Amazon (AMZ)

Google (GOOG)

PowerShares Preferred Stock ETF (PGX) - add to

Vanguard Intermediate-Term Corporate Bond ETF (VCIT) - add to

Sells

Facebook (FB)

Deere (DE)

TransCanada Corp (TRP)

General Electric (GE) - partial sale

BP PLC (BP)

Thinking About . . .

Impact of lower oil prices on terrorist's operations.

General Electric (GE)

Sonic Corp (SONC) - burgers. MC: \$1.5B

Dollar General (DG)

Pfizer (PFE)

PowerShares QQQ ETF (QQQ)

JD.Com, Inc ADR (JD) - Chinese Amazon. MC: \$37B

"Frozen with indecision."

Forum Resources

Investment Forum Website. The Investment Forum has its own website, www.olligmu.org/~finforum. Or the OLLI website, 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.

Al Smuzynski

Investment Forum Moderator

asmuzynski@verizon.net