

INVESTMENT FORUM AGENDA FOR WEDNESDAY, MARCH 30, 2016, 11:50AM, Lord of Life Lutheran Church

The Forum will meet every Wednesday, 11:50AM, at Lord of Life, until the end of the Spring term on May 11.

Market Perspective. A down week, after five straight up weeks. For the week ending March 25, the DOW was down 0.5%; the S&P down 0.7%; and the NASDAQ down 0.5%. Falling oil prices were to blame; the market's correlation to energy prices continues. And perhaps the market just needed a breather after moving up so strongly from the February 11, 2016 lows.

“Solid Dividend Bets.” Let's look at ten stocks from this week's *Barron's* article.

Mid-Cap and Small Cap stocks. We have not looked at mid-caps and small-caps in a while. Let's look at what mid-caps and small-caps are, and how they have performed compared to large-caps, and at what points in the business cycle they do better or worse than the large-caps.

Future Topics.

Panel Discussion on Stock Picking. The Forum is about evenly split on members who buy individual stocks, and members who invest only via funds. We will have a four-person panel discussion on April 20, on exactly how the panel members select their stocks: how they get ideas, how they research their decision and what metrics they use, what services or advice they seek, and at what point they make the actual decision to buy. If you buy individual stocks, and would like to participate on the panel, please let me know.

Picking investment advisors. We last talked about this a year ago. Please let me know if you use an advisor (somebody you pay a fee to, to manage your portfolio or a part of it,) and are willing to share your experiences. Also if you use the services of “robo advisors.”

Panel Discussion on Mutual Funds. A number of you have asked for more discussions on mutual funds. We will have a panel (date to be decided) on how you select mutual funds: how you judge the performance, what metrics you use; what publications, services, websites, and ratings you use. Please let me know if you would like to be a panelist.

Buys and Sells (week of March 27)

Buys

Verizon (VZ)

Duke Energy (DUK)

Vanguard Dividend Growth Fund (VDIGX)

Enterprise Products Partners LP
Wells Fargo (WFC)
Royal Dutch Shell (RDSB)
Gilead (GILD)
Tesla (TSLA)

Sells

Vanguard Total Market Fund (VTI)
ProShares S&P 500 Dividend Aristocrats (NOBL)
General Electric (GE)
Dodge & Cox Income Fund (DODIX)

Thinking About . . .

General Electric (GE)
ProShares S&P 500 Dividend Aristocrats (NOBL)

Observation - It is not unusual to see the same names as buys, sells, thinking about.

Forum Moderator(s) needed April 27. You pick the topics, or I can help. Or a two-person tag-team. I can distribute the agenda.

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.

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