

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, AUGUST 24, 2016, 10:30AM,  
Lord of Life Lutheran Church, 5114 Twinbrook Road, Fairfax**

We are meeting at **10:30AM**, this week, at Lord of Life, in the Sanctuary. No registration is required. We will continue to meet on Wednesdays, at 10:30AM, at Lord of Life, through September 14.

Be sure to register for the Fall term. Registration ends Thursday, August 25, at noon.

**Market Perspective.** Another quiet week. For the week, the DOW was down 0.1%; the S&P was flat; and the NASDAQ was up 0.1%. All indexes remain near their all-time highs. This bull market, which began in March 2009, is now the second longest in history.

Eyes are on Jackson Hole and the Fed's meeting there this week, and signals of a rate hike in September or December this year.

**Market-Linked Investments.** Sy Sherman will discuss these investments, which are unsecured notes of banks, with values and returns tied to one of a number of stock, commodity, or market indexes.

**Utilities.** After strong performance this year, are utilities overvalued and time to lighten up?

**Morningstar Dividend Investor.** What do you think of changes in MDI?

**Future Topics.** We will look at the following topics that you have suggested:

Investment Advisors. Tom Crooker and Maury Cralle will discuss his experience with Investment Advisors.

Banks. We have discussed banks quite a bit, but some of you want more.

Ongoing feedback of forum topics is always welcome. We will look at topics suggested in the survey, sometime in the Fall.

## ***Buys and Sells***

### Buys - week of August 17

Enterprise Products Partners LP (EPD)

Enbridge Energy Management LLC (EEQ)

Plains All American (PAA)

MPLX LP Partnership Units (MPLX)

Berkshire Hathaway (BRKB)

Novo Nordisk (NVO)

Vanguard Intermediate Term Corporate Bond ETF (VCIT)

Nvidia (NVDA)

Partial exchange of Lockheed Martin (LMT) for Leidos (LDOS)

### Sells - week of August 17

Pioneer Natural Resources (PXD)

SPDR S&P Dividend ETF (SDY)

### Thinking About . . .

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