

INVESTMENT FORUM AGENDA FOR WEDNESDAY, APRIL 15, 2020, 11:50AM

We will meet this week on-line, using Zoom videoconferencing, and until OLLI classes meet again in-person. It is likely that the OLLI Summer Term (June 22-July 31) will meet using Zoom. If you do not use Zoom, OLLI tech staff can help you.

I will send out emails with a link to the meeting, the day before or at least an hour before the start of the meeting. You can enter the meeting 15 minutes before the start.

Welcome to the Tom Crooker Investment Forum, Zoom videoconferencing webinar version. This will be our third full session using Zoom. OLLI is considering revisions to entering classes in response to Zoom security concerns; you will be advised of any changes.

This week, we have more new members, either to the Forum or to OLLI. If you are new to either, and you did not introduce yourselves last week, please consider introducing yourself: your name; what you did; how long you have been an investor; and why you joined us. We are glad to have you! All participation is voluntary.

Markets

Best week since 1974. (What were you doing in 1974?) The DOW, S&P, and NASDAQ were up 12.7%, 12.1%, and 10.6%. We are now out of bear market territory - down less than 20% from the February 19 highs. Are we over the hump? Light at the end of the tunnel? Dead cat bounce? Pick your metaphor. The virus and distancing and economy shutdown are still in full force, and everybody is asking when will things return to "normal," and what will "normal" look like? So many questions. So few answers.

Topics this Week

Panel of the CARES Act and Federal Reserve Actions. Brenda Bloch Young, Joe Benning, and I will discuss the recent legislation and Fed actions. Did these drive last week's stock market rally, and will it work? This discussion will be interactive. You can comment using the Q&A, or the Raise Hand. I am looking for an additional panelist.

Garrett Ruhl will comment on where things stand and look at sectors and companies that stand to benefit.

Upcoming Topics

We will be rescheduling the upcoming topics.

Industrial Automation. Ray Willson will talk about industrial robots and the leading companies in this industry.

Financial Advisors (continued.) Jerry Anderson, Marvin Singer, and Craig Zane will talk about how they use financial advisors. This is a continuation of the panel discussion from several months ago, with members sharing a wide range of how they select and use financial advisors.

Utility Sector. Brenda Bloch-Young will discuss the utility sector, which has changed recently, at a later date.

Buys and Sells

Buys (weeks ending 4/11/2020)

Vanguard Total International Stock ETF (VXUS)
CVS (CVS)
Lam Research (LRCX) - add
Zillow (Z) - website - add
Zillow Group (ZG) - realtor - add
Alphabet (GOOG) - add
Alphabet, Inc (GOOGL) - parent - add
AT&T (T) - add
Wells Fargo (WFC) - add
Genuine Parts (GPC)
Theravance Biopharma (TBPH)
iShares Emerging Markets ETF (EMB)
Vanguard REIT ETF (VNQ)
Brookfield Asset Management (BAM)
Houlihan Lokey (HLI) - investment bank. MC: \$3.7B
Alphabet (GOOG)
CVR Energy (CVI)
Treasury Long Term ETF (TLT)
Vanguard S&P 500 ETF (VOO)
Energy Transfer LP (ET)
MGM Resorts (MGM)
Canadian Solar (CSIG)
Marriott Vacations (VAC)
Facebook (FB)

Sells (weeks ending 4/11/2020)

Ford (F)

Coca Cola (KO)

JP Morgan (JPM)

Loews (L)

Oracle (ORCL)

Westwood Holdings Group (WHG)

Exxon Mobil (XOM)

Royal Dutch Shell (RDS.B)

Borg Warner (BWA)

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