

INVESTMENT FORUM AGENDA FOR WEDNESDAY, APRIL 29, 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.

The Zoom link remains the same. You can enter the meeting 15 minutes before the start.

Markets

A ho-hum week, by Spring 2020 standards. The DOW was down 1.9%, the S&P was down 1.3%, and the NASDAQ was down 0.2%. The big news was oil futures going negative, and further actions to rescue the economy. Attention now is focussed on efforts to reopen, whether customers will return, and will there be another virus outbreak.

Topics this Week

Mutual Funds. Following-up on a brief discussion from last week, James Dann will discuss managed mutual funds, evaluating those with good records, Morningstar's star ratings, and some that he favors.

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

Bob Baker will do his review of the Buys and Sells. Comments from the buyers or sellers is welcome

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.) 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 on May 6.

Buffett Annual Shareholders Meeting 5/2, 4:00PM livestream on Yahoo Finance.

Buys and Sells

Buys (week ending 4/25/2020)

Constellation Brands (STZ)
VanEck Vectors Video Gaming and eSports ETF (ESPO)
Schwab US Dividend Equity ETF (SCHD)
Raytheon Technologies (RTX)
IBM (IBM)
STORE Capital (STOR)
Coca Cola (KO)
Canon (CAJ)
Gilead (GILD)
Roche Holdings (RHHBY)
United Parcel Service (UPS)

Sells (week ending 4/25/2020)

Otis Worldwide (OTIS)
Carrier Global (CARR) - 2 sells
Wells Fargo (WFC)
HSBC Holdings (HSBC)
Target (TGT)
Steel Dynamics (STLD)
iShares Edge MSCI Minimum Volatility EAFE ETF (EFAV)
CVS (CVS)

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