

INVESTMENT FORUM AGENDA FOR WEDNESDAY, JULY 1, 2020, 11:50AM

We will meet this week on-line, using Zoom webinar, at 11:50AM. We will meet at this time through July 26. We will then meet as a “club” starting August 5, at 10:30AM, to September 16.

The Zoom link is 84481995230. Be alert for Zoom link changes, with notification by email from OLLI and/or from me. The OLLI calendar on its webpage, oli.gmu.edu has classes and current Zoom links.

Markets

All eyes, once again, are on the pandemic numbers, as some states experience rising numbers of infections and deaths. Will there be another lockdown, along with unemployment, business slowdowns and empty stores and restaurants? How much ammo does the Fed have left? For the week, the DOW was down 3.3%; the S&P was down 2.9%; and the NASDAQ was down 1.9%.

Topics this Week

Investment Forum Member Survey. You received a copy of the survey results after last weeks session. What observations do you have? Are there any surprises? What additional information might be interesting or useful?

Bob Baker will review the buys and sells.

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

Upcoming Topics

Agriculture. John Woods will look at the agriculture and farming industry.

Health Care sector. I would like to put together a panel to discuss the health care sector, including health care ETFs, managed funds, and some individual stocks.

Investing Mistakes. Our “lessons learned” panel will talk about humility meted out by Mr. Market.

Sector Allocations. Over several weeks, I will look at mid caps, small caps, and some some international stocks, using ETFs and closed end funds.

Buys and Sells

Buys (week ending 6/28/2020)

CRISPR Therapeutics (CRSP) - 2 buys
Merck Kgaa (MKKGY)
Marathon Petroleum (MPC)
Nike (NK)
Workhorse Group (WLHS) - add
Kroger (KR)
Blackrock Science and Technology Trust (BST)
Adobe (ADBE)
QQQ Trust (QQQ)
Vanguard Total International Stock ETF (VXUS)
AT&T (T) - add
Pfizer (PFE - add
OGE Energy (OGE)
Global X ETF (CLOU)
Medtronic (MDT)

Sells (week ending 6/28/2020)

Vanguard FTSE Pacific ETF (VPL) - to buy VXUS
Vanguard FTSE Emerging Market ETF (VWO)- to buy VXUS
Applied Optoelectronics (AAOI)
HealthEquity (HQY)
JOYY ADR (YY)
Medtronic (MDT)
Momo ADT (MOMO)
Schnitzer Steel (SCHN)
Bank of Novo Scotia (BNS)
Gilead (GILD)
American Eagle Outfitters (AEO)
Procter & Gamble (PG)
Tanger Outlets (SKT)
Wells Fargo (WFC)
Zillow (Z)

Thinking About . . .

Plug Power (PLUG)

Wrap Technologies (WRAP)

HP (HPQ)

Walgreens Boots Alliance (WBA)

SPDR S&P Biotech ETF (XBI)

Vanguard Real Estate ETF (VNQ) - sell

Investment Forum Website. The Investment Forum website may be accessed directly at <http://olligmu.org/finforum/index.html>, or through the OLLI website at oli.gmu.edu, then pressing the “Clubs/Groups” link at the upper right of the home page, followed by the “Inve\$tment Forum” link on the dropdown list. Please contact Jim Coile, the Webmaster with any presentation contributions, article suggestion, or improvements by emailing jcoile@gmu.edu.

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