

## **INVESTMENT FORUM AGENDA FOR WEDNESDAY, AUGUST 5, 2020, 10:30AM**

We will meet this week on-line, using Zoom webinar, at 10:30AM

We will meet as a “club” to September 16. We will meet during our club meetings without OLLI tech support, but we think we can pull this off!

The Zoom link is 86111819898 (new) this week. Be alert for Zoom link changes, with notification by email from OLLI and/or from me. The OLLI calendar on its webpage, [olli.gmu.edu](http://olli.gmu.edu) has classes and current Zoom links.

Registration for the Fall term (September 21 to November 13) runs from August 18 to August 26, noon.

### **Markets**

The tech sector came roaring back this week, after several down weeks, topped off by Apple’s blowout second quarter. For the week, the DOW was down 0.3%; the S&P was up 1.7%; and the NASDAQ was up 3.7%. Second quarter earnings are coming in mixed, but better (less bad) than many expected. “Stocks climb a wall of worry” appears appropriate.

### **Topics this Week**

Searching for Yield. Jim Dann will look at preferred stock managed mutual funds. Later, we can then compare the performances of the different fund types for a similar investment. How do indexed funds (ETFs) stack up against managed funds (mutual funds) and managed and leveraged funds (CEFs) for yield and price volatility? Jim and I plan to do this for other investment sectors.

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

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.

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

Stop Loss Orders. Who uses or has used stop loss orders, and would be willing to discuss these and your experience with them?

## **Buys and Sells**

### Buys (week ending 8/2/2020)

iShares Asia 50 ETF (AIA)

Johnson Controls Internation (JCI)

CVS (CVS)

iShares Self-Driving EV and Tech ETF (IDRV) MC: \$33M

Caterpillar (CAT)

Taiwan Semiconductor (TSM) - 2 buys

Vanguard Short Term Bond ETF (VCSH) - add

Intel (INTC)

Eastman Kodak (KODK) - 2 buys

Sea Ltd, ADR (SE)

Okta, Inc. (OKTA) - cybersecurity (MC: \$28B)

Coupa Software (COUP)

CrowdStrike Holdings (CRWD)

Trade Desk (TTD)

Southern Company (SO)

SFL Corp (SFL) - shipping.

Glaxo Smith Kline (GSK)

Qualcomm (QCOM)

Sanofi (SNY)

### Sells (week ending 8/2/2020)

Eastman Kodak (KODK) - partial, from buy above

ETFMG Prime Cyber Security ETF (HACK)

Intel (INTC) - trim, for RMD

Procter & Gamble (PG)

Schwab Short Term Treasury ETF (SCHO) - partial

Aurora Cannabis (ACB)  
Boeing (BA)  
Sundial Growers (SNDL)

Thinking About

Medtronic (MDT)  
Johnson & Johnson (JNJ)

**Investment Forum Website.** The Investment Forum website may be accessed directly at <http://olligmu.org/finforum/index.html>, or through the OLLI website at [olli.gmu.edu](http://olli.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](mailto:jcoile@gmu.edu).

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