

**INVESTMENT FORUM AGENDA FOR WEDNESDAY,
FEBRUARY 24, 2021 10:30AM**

We will meet as a “club” from February 24, to March 24, at 10:30AM. The Spring Term begins March 31 and ends May 19.

Registration for the Spring Term begins February 24 and ends March 3 at noon.

The Zoom link for this week is 815 9385 8947, Passcode 375733. Watch for any notices from OLLI of the Zoom link (the morning of the classes) and use those, if different from this one.

Markets. A mostly down week, with the DOW up 0.1%; the S&P down 0.7%; the NASDAQ down 1.6%; and the Russell 2000 down 1.0%. Economic numbers were mostly positive, with rising retail sales and general optimism about stimulus, and improving pandemic numbers and vaccine distribution. On the other hand, if you live in Texas . . .

Optimism on the economy and markets for 2021 is very high. Talk of economic growth of 7%, as consumers get out and start spending, helped by continued easy money. What does that mean for investment strategies? Should we be concerned about inflation?

Topics This Week

Health-Care Sector. Tom Kaufman will look at investment in healthcare, the largest sector in the US economy, with an overview of its major subsectors, recent performance and forecasts. Additional emphasis on pharmaceuticals and biotech, as time permits.

Bob Baker will look at the Buy/Sell list.

Buys and Sells

Buys (week ending 2/19/2021)

TransMedics Group (TMDX)
Star Peak Energy Transition Corp (STPK)
Air Products (APD)
Motus GI Holdings (GIK) - add
Medical Properties Trust (MPW)
Falcon Capital Acquisition Corp (FCAC) - add
ARK 3D Printing ETF (PRNT)
I Shares Global Clean Energy ETF (ICLN) - add
Merck (MRK) - 2 buys
Freeport McMoran (FCX)
Bunge LTD (BG)
Kimberly Clark (KMB) - add
Westlake Chemical Partners (WLKP)

Sells (week ending 2/19//2021)

Ford (F) - trim
Mid-America Apartment Communities (MAA) - trim
Duke Energy (DUK)

Upcoming Topics.

Mutual Funds. Over the next few months, Jim Dann will look at managed mutual funds investing in Asian stocks; and low-cost mutual fund families that are not well known.

Options trades. We will have a discussion of a number of options trades shown in the January 20 and this weeks' Buys and Sells. Date TBA.

Investment Forum Website. The Investment Forum website may be accessed directly at <https://olligmu.org/finforum/index.html>. **(Note new website address.)** 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 email, ctj444@icloud.com The website has current and past agendas and buy/sell list presentations.

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