

INVESTMENT FORUM AGENDA FOR WEDNESDAY, April 21, 2021, 11:50AM

The Zoom link for this week can be found in the Daily Schedule, sent to all enrolled in the class on Wednesday morning, or through the Member Portal. The Zoom link is 892 4751 0873 Passcode 016 203. Dial in 301-715-8592.

Markets

Can we stand all the good news? Any “irrational exuberance” going on? (The Alan Greenspan term is now 25 years old!) Perhaps not, given the strong growth, employment numbers, and quarterly profit numbers rolling out. For the week, the DOW was up 1.2% (up 11.7% YTD;) the S&P was up 1.4% (up 11.4% YTD;) the NASDAQ was up 1.1% (up 9.0% YTD;) and the Russell 2000 was up 0.9% (up 16.5% % YTD.) And long term interest rates declined, so even bond prices were up. Along with oil prices. Everybody is an investing genius in times like this . . .

Topics This Week

Covered Call Options. A few weeks ago, I sold covered calls on Apple and Leidos, expiring 5/21/2021. How are they doing?

Bob Baker will look at the Buy/Sell list.

Buys and Sells

Buys (week ending 4/16/2021)

Hercules Capital (HTGC) - add

Amazon (AMZN)

Bitcoin - add

Etherium - add

Altria (MO)

British American Tobacco (BTI)

ARK Innovation ETF (ARKK) - add

ARK Space Exploration & Innovation ETF (ARKX) - add

3D Printing ETF (PRNT) - add

AT&T (T) - add
Williams Companies (WMB)
Vanguard Financials ETF (VFH)
T Rowe Price Mid Cap Value Fund (TRMCX)
T Rowe Price New Asia Fund (PRASX)
Coinbase (COIN)
BNP Paribas SA (BNPQY) - add
Borg Warner (BWA)
Simmons First National Corp (SFNC)
Taiwan Semiconductor (TSM) - add
Vishay Intertechnology (VSH) - semiconductors. MC: \$3.7B

Sells (week ending 4/16/2021)

Kontoor Brands, Inc. (KTB)
LGL Systems Acquisition Corp (DFNS) - SPAC
Global X Autonomous & Electric Vehicles ETF (DRIV)
Schwab U.S. Broad Market ETF (SCHB) - trim
T Rowe Price Mid Cap Growth Fund (RPMGX) - trim
Weight Watchers (WW) - trim
Colfax (CFX)
Pinterest (PINS)
Hostess (TWNK)
iShares Silver (SLV)

Upcoming Topics.

REITS. Bob Baker will look at REITS; date to be announced

Investment Forum Website. The Investment Forum website may be accessed at oli.gmu.edu, then pressing the “Clubs & Activities” link in the center of the home page 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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