

**INVESTMENT FORUM AGENDA FOR WEDNESDAY,
May 5, 2021, 11:50AM**

OLLI Board of Directors election May 7 to May 21.

Registration for the Summer Term May 24 to June 1.

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

Down to sideways week. The DOW was down 0.5%; the S&P was even; the NASDAQ was down 0.4%; and the Russell 2000 was down 0.2%. Big earnings beats by Apple, Microsoft and Amazon did not move the stocks. Upside already priced in? And the markets shrugged at the Fed's continued easy money, the administration's ambitious spending programs, financed in part by increased corporate, capital gains, and inheritance taxes.

Topics This Week

REITs (continued). Following up on our discussion last week, Jim Dann will look at some managed mutual funds that invest in REITs, as a way to get exposure to the sector.

Bob Baker will look at the Buy/Sell list.

Buys and Sells

Buys (week ending 4/23/2021)

Wasatch Emerging India Fund (WAINX)
ALPS/Kotak India Growth Fund (INDAX)
Amazon (AMZN) - add
Nuveen Preferred and Income Opportunities Fund (JPC) - add
Ethereum
Vanguard Short Term Corporate Bond ETF(VCSH)
Costco (COST)
Clorox (CLX)

Schwab Large-Cap Growth ETF (SCHG)
Pinnacle West Capital (PNW) - add
Williams Company (WMB)
ARK Space Exploration ETF (ARKX) - add
Credit Suisse (CS) - add
CrowdStrike (CRWD) - add
Emerson electric (EMR)

Sells (week ending 4/23/2021)

I Shares MBS ETF (MBB) - trim
Meredith Corp (MDP)
CVR Energy (CVI)
Heritage Homes (MTH)

Advisor Managed portfolios

Apple (AAPL) - trim

Thinking About . . .

Total (TOT)

Investment Forum Website. The Investment Forum website may be accessed at <https://olli.gmu.edu>, then pressing the “Clubs & Activities” link in the center of the OLLI home page, followed by the “Investment 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 and other presentations.

Passing. Jim Miller, a long time Forum member until a few years ago, died after contracting Covid.

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