

**INVESTMENT FORUM AGENDA FOR WEDNESDAY,
May 19, 2021, 11:50AM**

OLLI Board of Directors election May 7 to May 21.

Registration for the Summer Term May 24 to June 1.

The Forum Spring term sessions end on May 19. We will begin meeting as a “club” on May 26 at 10:30AM. The Summer term begins on June 23.

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

Inflation! Is it a real worry or not? Markets went both ways last week. A problem on Monday, Tuesday, and Wednesday, and not so much on Thursday and Friday. For the week, the DOW was down 1.1%; the S&P was down 1.4%; the NASDAQ was down 2.3%; and the Russell 2000 was down 2.1%. Interest rates did not tell us much about inflation.

Topics This Week

Inflation! Continuing with the word of the week, “Barron’s” suggested four ETFs for Investors nervous about inflation. We will take a look at those funds, and what sectors and strategies they represent.

Bob Baker will look at the Buy/Sell list.

Buys and Sells

Buys (week ending 5/14/2021)

Capital Southwest Corp (CSWC) - add

Hercules Capital (HTGC) - add

Colgate Palmolive (CL)

Rocket (RKT) - add

Houlihan Lokey (HLI) - add

AT&T (T) - add

Hormel (HRL) - add

First Eagle Overseas Fund (SGOVX) - add

Sells (week ending 5/14/2021)

Ford (F) - trim

CVS (CVS)

Advisor Managed portfolios

Thinking About . . .

Kinder Morgan (KMI)

Williams Company (WMB)

SPDR Blackstone Senior Loan ETF (SRLN)

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

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