

INVESTMENT FORUM AGENDA FOR WEDNESDAY, AUGUST 25, 2021, 10:30AM

The Zoom link for the club sessions is 861 3821 8978, Passcode 984305. The Zoom link can also be found in the Daily Schedule or through the Member Portal.

We will meet as a “club” at 10:30AM, until the beginning of the Fall Term, on September 22.

Registration for the Fall Term began August 16, and ends Tuesday, August 24, at 12 Noon. OLLI will meet via Zoom for the Winter term, but the Investment Forum may be able to meet a few times in a “hybrid” setting.

Markets

A down week, with the DOW down 1.1%; the S&P down 0.6%; the NASDAQ down 0.7%, and the Russell 2000 down 2.5%. The Russell 2000 (small caps) has underperformed in recent months, after leading the markets for several quarters. Talks of the Fed “tapering” its bond buying as early as in a few months (but possibly delayed if covid slows the economy,) drove markets lower.

Topics This Week

Robo Advisors. We have followed the robo-advisor industry for several years, as it has grown and matured. Brenda Bloch-Young will present the latest comparisons of robo advisors, which were highlighted in the August 11 Barron's.

Buys and Sells. Bob Baker will look at the buys and sells.

Buys and Sells

Buys (week ending 8/20/2020)

Kinder Morgan (KMI) - add

Walgreens Boots Alliance (WBA) - add

Lockheed Martin (LMT) - add

Hercules Capital (HTGC) - add

AT&T (T) - add

Williams Companies (WMB) - add

Intuit (INTU)

Hubspot (HUBS)
Zebra Tech (ZBRA)

Sells (week ending 8/20/2020)

Ford (F) - trim
Mid-American Apartment Communities (MAA) -trim
Emerson Electric (EMR) - trim
CVS (CVS) - trim
Air Products (APD)
RobinHood (HOOD)
Match Group (MTCH) - trim

Advisor trades

Hormel (HRML) - sell

Thinking about . . .

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 “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 lists and other presentations.

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