

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, SEPTEMBER 8, 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.

Markets

We got bad jobs’ numbers on Friday - just 1/3 the new jobs expected - but markets mostly shrugged. For the week, the DOW was down 0.2%; the S&P was up 0.6%; the NASDAQ was up 1.6%; and the Russell 2000 was up 0.7%. YTD, the S&P500 is up nearly 21%. What’s not to like?

Topics This Week

“Equity Styles” of Independent Research Firms. Do the independent research firms (Argus, CFRA, Zacks, MSCI, others) favor value or growth? Fidelity suggests that they do. Please share how you use (or don’t use) the research firms.

“How \$70,000 in an IRA grew to a cool \$222 million.” This was the title of an article by Allan Sloan in the Business Section of the Washington Post on August 29. It is posted in the Investment Forum website. Is this for real?

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

Buys and Sells

Buys (week ending 9/3/2020
Owl Rock Capital Corp (ORCC)
Getty Realty (GTY) - add
Kinder Morgan (KMI) - add
CareTrust REIT (CTRA) - add

Grayscale Ethereum Trust (ETH)
Jefferies Financial Group (JEF)
Steel Dynamics (STLD) - add
Upstart (UPST)
Matterport (MTTR)

Sells (week ending 9/3/2020)

Ford (F) - trim
Mid-America Apartment Communities (MAA) - trim

Advisor trades

Thinking about . . .

Chart Industries (GTLS)

Future Topics

“Sell in May and Go Away.” On September 22, Sylvia Auton will look at some of the popular market sayings and terms.

“Should retirees mortgage their homes?” Conventional wisdom says a goal of retirees is a mortgage-free home. With mortgage rates at 3%, is the still a good goal?

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 lists and other presentations.

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