

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, SEPTEMBER 15, 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.

This is our last “club” meeting, until the start of the Fall Term, on September 22, at 11:50AM.

**Markets**

Tough week, with the DOW down 2.2%; the S&P down 1.7%; the NASDAQ down 1.6%, and the Russell 2000 down 2.8%. Is the market now reacting to the risks that it has dismissed the past few months? Covid and its impact on jobs and business activity; and worrisome inflation numbers? We have not had a 5% or 10% pullback since March 2020, and we are overdue for one or the other. Is this the pause that refreshes, or uh-oh? A buying opportunity?

**Topics This Week**

“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 9/10/2020)  
Owl Rock Capital Corp (ORCC)  
Upstart (UPST) - 2 buys  
Matterport (MTTR) - 2 buys  
The Trade Desk (TTD)  
Lockheed Martin (LMT) - add  
Gaming and Leisure Properties (GLPI) - add  
Ares Capital (ARES) - add

Citizens Financial Group (CFG)  
Wells Fargo (WFC)  
Affirm (AFRM) - 2 buys  
Apple (AAPL) - add  
Plug Power (PLUG)  
NVIDIA (NVDA)  
Zynga (ZNGA)

Sells (week ending 9/10/2020)

Ford (F) - trim  
Mid-America Apartment Communities (MAA) - trim  
Qualcomm (QCOM) - trim  
NetApp (NTAP)  
ARK Next Generation Internet ETF (ARKW)  
Sell to open MSFT \$300 put, expire 6/16/2023  
Sell to open AAPL \$150 put, expire 9/15/2023  
Dominion Energy (D)

Advisor trades

Hormel Foods (HRML) - buy  
Canadian National Railway (CNI) - sell

Thinking about . . .

***Future Topics***

Trevor Montano. Mr. Montano, a GMU alumni and principal of West Potomac Capital, a leveraged fund that invests in preferred stocks. He is also a GMU Trustee and leads the Montano Student Investment Fund, a student managed fund in the Mason School of Business. He will speak to us on September 29 on his investment strategy, and later on the student investment fund and the Mason endowment.

“Sell in May and Go Away.” On October 13, 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 “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](mailto:ctj444@icloud.com) The website has current and past agendas and buy/sell lists and other presentations.

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