

INVESTMENT FORUM AGENDA FOR WEDNESDAY, OCTOBER 13, 2021 11:50AM

The Zoom link for the Fall Term is 845 4198 5377, Passcode 095197. Dial in 301-715-8592. The Zoom link can also be found in the Daily Schedule or through the Member Portal.

We did not collect buys and sells this week. We will collect two weeks of your trades next week, for the October 20 session.

Markets

An up week (surprising?) despite headwinds: debt ceiling showdown postponed to December; rising interest rates and Fed tapering, likely to start in November; questions on China; and disappointing jobs' numbers. Earnings' season kicks off this week, with the banks' results giving hints of what is to come.

Topics This Week

Montano Student Investment Fund. Trevor Montano will discuss the student managed fund in the Mason School of Business. The Montano Student Investment Fund as a piece of the Mason endowment, managed by students in the School of Business. We will have students and faculty as guests in the discussion.

Future Topics

ESG investing. Tom Kaufman, David Breese, Brenda Bloch-Young, and Jim Dann will discuss ESG on November 3, likely to continue on November 10. Companies that have strong records on environmental, social, and governance. And ESG funds.

Sell in May and Go Away. On October 20, Sylvia Auton will look at some of the popular market sayings and terms.

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.

Morningstar Dividend Investor. This is a monthly newsletter, with model portfolios, of interest to dividend investors. that I have distributed the newsletter to interested Forum members for years. (It is also available, along with other Morningstar premium newsletters, via the county library websites.) Please let me know if you would like to be added to my distribution list.

Al Smuzynski
Investment Forum Moderator
asmuzynski@verizon.net