

INVESTMENT FORUM AGENDA FOR WEDNESDAY, NOVEMBER 10, 2021 11:50AM

This week is our last regular session in the Fall term. The Zoom link for this week is 845 4198 5377, Passcode 095197. Dial in 301-715-8592. We will begin meeting next week, November 17, as a “club,” at 10:30AM. Club meeting dates for the rest of 2022 are: 11/17, 12/1, 12/8, and 12/15. A new Zoom link will be sent to you, and will be in the OLLI Daily Schedule. The Forum agenda and topics are the same in regular and club sessions.

Markets

Another nice up week, with markets at or near new all time highs, and recovering the modest pullback since Labor Day. (That is the same first line for the past three weeks.) Who needs market experts? Who needs the Investment Forum? Just buy anything! For this week, the DOW was up 1.4% %; the S&P was up 2.0%; the NASDAQ was up 2.3%; and the Russell 2000 was up 6.1%! (!!!). Good jobs numbers, the Fed acting as expected, pandemic easing. And the predictions of Messrs. Glassman and Hasset, authors of “DOW 36,000” in 1999, finally came true.

Topics This Week

ESG Investing (continued.) This week, we will continue with our discussion of ESG (environmental, social, and governance) investing. David Breese, and Jim Dann will talk about tools to search for ESG investments; and high performing funds of companies with strong ESG records. Questions and comments are invited during the discussions.

AG. John Woods will update us on the state of agriculture, and why farmers in Illinois are smiling.

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

Buys and Sells

Buys (week ending November 5)

Upath (PATH) - 2 buys
CareTrust (CTRE) - add
Kinder Morgan (KMI) - add
Capital Southwest Corp (CSWC) - add
Store Capital Corp. (STOR) - add
Verizon (VZ) - add
Lockheed Martin (LMT)
Tractor Supply (TSCO)
Pfizer (PFE) - add
First Trust NASDAQ Cybersecurity EFT (CIBR) - add
Marathon Petroleum Corp (MPC) -add
Alphabet (GOOG) - add

Sells (week ending November 5)

Bank of America (BAC)
Organon (OGN)
First Eagle Overseas Fund (SGOVX)
Zillow (Z)
Moderna (MRNA) - trim
Carlyle Group(CG) - trim

Future Topics

Mason Student Managed Investment Fund. Many will return on November 17, as a follow-up to the SMIF presentation on October 13. We are working on regular updates from the SMIF on their trades as part of the Forum.

Follow ups. Do you have a follow-up question from a previous Forum topic? Please ask it! If you have a question, others likely are thinking about it also. You can send me an email, and I will bring it up. Or use the chat window on Zoom.

DOW Sheet Cake. In the Spring term, after a return to in-person/hybrid classes, we will celebrate the bull market with a final sheet cake, in honor of Forum stalwart and friend, Ed Swoboda. Ed provided sheet cakes at DOW milestones for two decades.

Other

Investment Forum Website. The Investment Forum website may be accessed at [https://**olli.gmu.edu**/](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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