

INVESTMENT FORUM AGENDA
WEDNESDAY, FEBRUARY 16, 2022, 11:50AM

This is the last session of the Winter Term. We will then start meeting as a “club” on February 23 at 10:30AM until the beginning of the Spring Term on March 30.

The Zoom Meeting ID for the Winter Term is: 878 4902 7587.
Passcode: 339 963. The link will be sent out in the OLLI Daily Schedule, on Wednesday mornings. A new Zoom link will be assigned for the club meetings, starting February 23.

Registration for the Spring Term runs from February 23 to March 2.

Starting this week, the Buy/Sell list will be sent out separately by Bob Baker on Sunday evenings. He will also request buys and sells.

Markets.

A down week, with worrisome inflation numbers and what will the Fed do in response. A 1/2% rate increase in March is being forecast, and that may just be the beginning. Also Russia/Ukraine worries, and we are entering year 3 of the pandemic. For the week, the DOW was down 1.0%; the S&P was down 1.8%; the NASDAQ was down 2.2%; and the Russell 2000 was down 1.4%. Volatility remains, and short term interest rates rising in anticipation of Fed tightening.

Topics this week.

Poll on travel. We will take a poll on travel plans. Do you expect to resume travel to pre-pandemic levels, and do you plan domestic or international travel? This question follows up on comments about travel industry stocks and their recovery.

Hydrogen Fuel Cells. Following up on discussions of hydrogen fuel cells and Plug Power (PLUG), there are a number of hydrogen focussed funds, which is another way to play this technology.

Bob Baker will look at the buys and sells.

Other

Investment Forum Moderator.

I have been the full-time Investment Forum Moderator since 2011, but must reduce my role to part-time due to changes in my time availability. The Forum leadership team will assume wider roles, and make some other changes, which we will discuss on Wednesday. Your input is invited.

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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Watch List: WEEK ENDING 02/11/22

Symbol	Description	Sector	Industry	News	Market Cap	P/E (ttm)
▼ BUYS:						
FSELX	Fidelity Select Semiconductors	--	--		--	--
IWD	Ishr Rssl 1000 Val	--	--		57.67B	3.33
XLE	Energy Select Sector	--	--		35.05B	3.69
MDC	M D C Holding Inc	Consumer Discretionary	Household Durables		3.11B	5.80
PTON	Peloton Interactive Inc	Consumer Discretionary	Leisure Products		12.42B	--
BMJ	Bristol-Myers Squibb	Health Care	Pharmaceuticals		144.97B	21.52
MRK	Merck & Co. Inc.	Health Care	Pharmaceuticals		193.39B	22.99
SNDL	Sundial Growers Inc F	Health Care	Pharmaceuticals		1.15B	--
MMM	3M Co	Industrials	Industrial Conglomerates		91.23B	16.17
UPS	United Parcel Srvc Cl B	Industrials	Air Freight & Logistics		191.80B	30.60
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals		2,809.55B	29.31
NVDA	Nvidia Corp	Information Technology	Semiconductors & Semiconductor Equipment		645.75B	82.35
APD	Air Prod & Chemicals	Materials	Chemicals		55.96B	27.24
GLPI	Gaming & Leisure Ppt	Real Estate	Equity Real Estate Investment Trusts (REITs)		10.95B	17.99
GTJ	Getty Realty Corp	Real Estate	Equity Real Estate Investment Trusts (REITs)		1.27B	16.41
▼ SELLS:						
ARKF	Ark Fintech Innovation	--	--		1.65B	--
ARKG	Ark Genomic Revolution	--	--		4.04B	--
PFF	Ishares Preferred Income	--	--		18.41B	9.13
PGX	Pwrshrs Preferred	--	--		6.84B	--
VGK	Vanguard Ftseeuropean Etf	--	--		22.99B	3.38
PRU	Prudential Finl	Financials	Insurance		45.68B	6.21
LH	Lab Co Of Amer Hldg	Health Care	Health Care Providers & Services		27.01B	9.99
VTR	Ventas Inc	Real Estate	Equity Real Estate Investment Trusts (REITs)		20.48B	98.21
▼ THINKING ABOUT						
XLE	Energy Select Sector	--	--		35.05B	3.69

- LH (Sell) – Financial Advisor Trade
- Not shown: Purchase of I Bonds via Treasury Direct