

INVESTMENT FORUM AGENDA  
WEDNESDAY, FEBRUARY 23, 2022, 10:30AM

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

The Zoom meeting link and ID will be sent out on Wednesday morning in the OLLI Daily Schedule. I will also forward it Wednesday morning, before the session.

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

Markets.

Another no-good, rotten week. We are having a lot of those. For the week, the DOW was down 1.9%; the S&P was down 1.6%; the NASDAQ was down 1.8% (and down 13.4% YTD); and the Russell 2000 was down 1.1%. In addition to Ukraine, inflation, serious Fed tightening and rate increases, what about oil prices? If oil gets to \$150, what will that do?

Topics this week.

*The Fed, Inflation, and the End of Easy Money.* Tom Crooker will look at this week’s Barron’s lead article.

*Bond funds.* Jim Dann will look at bond funds. Time permitting, I will look at floating rate, bank loan funds. These are funds, (ETFs, mutual funds, and closed-end funds) that that buy loans with floating rates, which will rise with the rise in interest rates.

Bob Baker will look at the buys and sells.





## Other

### *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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**Watch List: WEEK ENDING 02/18/22**

Symbol	Description	Sector	Industry	News	Market Cap	P/E (ttm)
<b>▼ BUY: 14-18 Feb</b>						
DODGX	Dodge & Cox Stock	--	--		--	--
XBI	Spdr S&P Biotech Etf Iv	--	--		6.76B	--
FB	Meta Platforms Inc Cl A	Communication Services	Interactive Media & Services		565.38B	15.73
RBLX	Roblox Corp	Communication Services	Entertainment		31.92B	--
T	A T & T Inc	Communication Services	Diversified Telecommunication Services		169.72B	8.67
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services		224.92B	10.04
EVGO	Evgo Inc	Consumer Discretionary	Specialty Retail		720.36M	--
BRK/B	Berkshire Hathaway	Financials	Diversified Financial Services		700.48B	8.43
SNDL	Sundial Growers Inc F	Health Care	Pharmaceuticals		1.26B	--
FCEL	Fuelcell Energy Inc	Industrials	Electrical Equipment		1.93B	--
IBM	Ibm Corp	Information Technology	IT Services		112.07B	24.79
INTC	Intel Corp	Information Technology	Semiconductors & Semiconductor Equipment		193.71B	9.92
MSFT	Microsoft Corp	Information Technology	Software		2,179.56B	31.90
NVDA	Nvidia Corp	Information Technology	Semiconductors & Semiconductor Equipment		612.68B	68.86
<b>▼ SELL: 14-18 Feb</b>						
ARKF	Ark Fintech Innovation	--	--		1.53B	--
ARKG	Ark Genomic Revolution	--	--		3.73B	--
ARKK	Ark Innovation Etf	--	--		11.72B	--
DODIX	Dodge & Cox Income	--	--		--	--
SCHB	Schwab U.S. Broad Market	--	--		22.26B	--
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services		224.92B	10.04
PRU	Prudential Finl	Financials	Insurance		42.99B	6.06
TCNNF	Trulieve Cannabis Corp F	Health Care	Pharmaceuticals		4.53B	36.45
VXRT	Vaxart Inc	Health Care	Biotechnology		594.85M	--
ASAN	Asana Inc	Information Technology	Software		12.87B	--
DOCU	Docusign Inc	Information Technology	Software		22.76B	--
<b>▼ THINKING ABOUT: 14-18 Feb</b>						
PG	Procter & Gamble	Consumer Staples	Household Products		383.10B	27.95
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals		2,756.03B	28.69
MSFT	Microsoft Corp	Information Technology	Software		2,179.56B	31.90

- Sell: 400 bushels corn in storage
- Sell: 300 bushels soybeans in storage
- Sell: 1000 bushels corn yet to be planted
- Sell: 500 additional bushels corn yet to be planted on price averaging over 10 weeks.