

INVESTMENT FORUM AGENDA
WEDNESDAY, MARCH 9, 2022, 10:30AM

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

The Zoom meeting link and ID for the club sessions is 878 0150 2780
Passcode: 386 334. The link may change. Be sure to use the link sent out in the Daily Schedule on Wednesday morning.

Markets.

All attention remains focussed on the horrors in Ukraine. What will Putin do next? And economic sanctions have put the world’s eleventh largest economy flat on its back, with 144 million Russians facing economic hardships. So while inflation and the Fed are still concerns, they pale compared to the first large scale invasion of a nation since World War 2. And all of this continues to impact markets. For the week, the DOW and S&P were down 1.3%; the NASDAQ was down 2.8%; and the Russell 2000 was down 2.0%. The 2-10 yield curve has flattened to .25%. Bad for banks.

Topics this week.

How to play global instability (continued)? Let’s hear more discussion on the risks and opportunities being driven by the invasion of Ukraine. What sectors, industries, and companies will be winners and losers. Defense? Energy? Oil? Industrials? Commodities? Financials? Gold? Cryptocurrencies?

Hugh Conway asks a question. Other than buying the F-35, which everybody wants, increased defense spending by European nations is likely to go to European companies and manufacturers. Who are they? Is there an ETF for European industrials or defense contractors? Apparently

not. (Wait a few weeks, Hugh. Betcha IShares and Vanguard are putting one together right now . . .)

Robo Advisors. We have sporadically followed the evolution off this industry - low-cost portfolio management, using mostly computer algorithms to set investment allocations. Brenda Bloch-Young will report on the latest analysis, of the top-performing services, and differences in services provided.

Forum leadership will have some walk-on topics to discuss.



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 The website has current and past agendas and buy/sell lists and other presentations.

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Symbol	Description	Sector	Industry	News	Market Cap	P/E (ttm)
▼ BUY: 28 Feb - 04 Mar						
CIBR	Fr Tr Nsdq Cybersecurity	--	--		5.75B	--
KRE	Spdr S&P Regional	--	--		5.56B	--
T	A T & T Inc	Communication Services	Diversified Telecommunication Services		170.79B	8.62
EVGO	Evgo Inc	Consumer Discretionary	Specialty Retail		724.49M	--
ABR	Arbor Realty Tr	Financials	Mortgage Real Estate Investment Trusts (REIT		2.68B	7.92
GS	Goldman Sachs Group	Financials	Capital Markets		107.60B	5.66
JPM	Jpmorgan Chase & Co	Financials	Banks		408.34B	9.07
UPST	Upstart Hldgs Inc	Financials	Consumer Finance		12.61B	109.74
FCEL	Fuelcell Energy Inc	Industrials	Electrical Equipment		2.09B	--
MMM	3M Co	Industrials	Industrial Conglomerates		84.69B	14.55
AMD	Advanced Micro Devic	Information Technology	Semiconductors & Semiconductor Equipment		182.23B	46.02
CRWD	Crowdstrike Hldgs Inc	Information Technology	Software		43.81B	--
HYSR	Sunhydrogen Inc	Information Technology	Semiconductors & Semiconductor Equipment		161.19M	2.38
INTC	Intel Corp	Information Technology	Semiconductors & Semiconductor Equipment		195.17B	10.06
APD	Air Prod & Chemicals	Materials	Chemicals		51.41B	24.51
CTRE	Caretrust Reit Inc	Real Estate	Equity Real Estate Investment Trusts (REITs)		1.72B	23.88
GLPI	Gaming & Leisure Ppt	Real Estate	Equity Real Estate Investment Trusts (REITs)		11.43B	20.44
SPG	Simon Pty Group	Real Estate	Equity Real Estate Investment Trusts (REITs)		45.81B	20.30
▼ SELL: 28 Feb - 04 Mar						
T	A T & T Inc	Communication Services	Diversified Telecommunication Services		170.79B	8.62
TGT	Target Corp	Consumer Discretionary	Multiline Retail		105.49B	15.95
BP	Bp Plc F	Energy	Oil, Gas & Consumable Fuels		92.59B	13.39
PSX	Phillips 66	Energy	Oil, Gas & Consumable Fuels		36.39B	28.41
TTE	Totalenergies Se F	Energy	Oil, Gas & Consumable Fuels		132.55B	8.99
QCOM	Qualcomm Inc	Information Technology	Semiconductors & Semiconductor Equipment		186.35B	19.40
PPL	Ppl Corp	Utilities	Electric Utilities		19.13B	--
▼ THINKING ABOUT: 28 Feb - 04 Mar						
UL	Unilever Plc F	Consumer Staples	Personal Products		121.53B	18.91
LHX	L3harris Technologies In	Industrials	Aerospace & Defense		49.32B	27.90
LMT	Lockheed Martin Corp	Industrials	Aerospace & Defense		121.95B	19.77
NOC	Northrop Grumman Corp	Industrials	Aerospace & Defense		70.20B	10.41